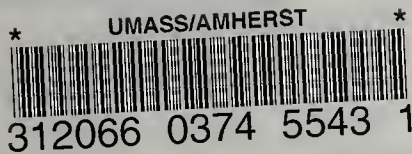


MASS. ED 1.2: C38/998/WORCESTER



WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Worcester, Massachusetts

GOVERNMENT DOCUMENTS
COLLECTION

JUL 27 2001

University of Massachusetts
Depository Copy

FINAL APPLICATION

January 5, 1998

Submitted to:
Massachusetts Department of Education
Boston Office
One Ashburton Place, Room 1403
Boston, Massachusetts 02108

RECEIVED

JAN 05 1998

DEPT OF EDUCATION
BOSTON OFFICE

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

APPLICANT INFORMATION SHEET

This application is for a (check one):

☒ Commonwealth Charter ☐ Horace Mann Charter

Name of Proposed Charter School Worcester Advantage Regional Charter School

School Address (if known) _____

School Location (City/Town) Worcester

Name of Group Applying for the Charter Worcester Advantage Regional Charter School, Inc.

Contact Person Mary Elizabeth Burke

Address 41 Hemlock Drive

City Holden State MA Zip 01520

Daytime Tel: (508) 767-7000 Fax: ()

E-mail: _____

The proposed school will open in the fall of school year: ☒ 1998-99 ☐ 1999-00

School Year	Grade Levels	Total Student Enrollment
First Year	K-5	546
Second Year	K-6	636
Third Year	K-7	726
Fourth Year	K-8	816
Fifth Year	K-9	906

Will this school be a Regional Charter School? ☒ Yes ☐ No

School Districts from which students are expected to come:

<u>Auburn</u>	<u>Oxford</u>	<u>Worcester</u>
<u>Leicester</u>	<u>Shrewsbury</u>	_____
<u>Millbury</u>	<u>Sutton</u>	_____

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

COMMONWEALTH CHARTER SCHOOL CERTIFICATION STATEMENT

Proposed Charter School Name Worcester Advantage Regional Charter School

Proposed School Location (City/Town) Worcester

I hereby certify that the information submitted in this application is true to the best of my knowledge and belief; and further, I understand that, if awarded a charter, the proposed school shall be open to all students, on a space available basis, and shall not discriminate on the basis of race, color, national origin, creed, sex, ethnicity, sexual orientation, mental or physical disability, age, ancestry, athletic performance, special need, or proficiency in the English language, and academic achievement. This is a true statement, made under the penalties of perjury.

Signature of

Authorized Person Josh Solomon MAB

Date 1-3-98

Print/Type Name Josh Solomon

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

I. ABSTRACT

The Worcester Advantage Regional Charter School will offer children in Auburn, Leicester, Millbury, Oxford, Shrewsbury, Sutton, and Worcester a free, world-class academic education, based on proven curricula and instructional practices. Beginning with a K-5 school next fall, the Charter School will expand by one grade each year. When fully developed, it will provide a comprehensive K-12 program designed to enable the area's socially and economically diverse student body to achieve International Baccalaureate status or a technical skill certification upon high school completion. The School's mission is to demonstrate the heights of academic achievement that public school students can routinely attain when provided superior educational opportunities.

The School will provide a challenging core curriculum for all students, using the Direct Instruction approach in its elementary English and mathematics curricula. The Direct Instruction curriculum consists of polished lesson plans that have been implemented successfully and refined for over twenty years. This distinctive and proven curriculum uses a mastery-based approach that ensures competence before students proceed to new material, but without delaying students who are ready to advance more quickly.

Complementing its rigorous academic program will be the Worcester Advantage Regional Charter School's structured, orderly environment, shaped in large measure by its character education program. All members of the School community will adhere to the School's Code of Civility, which will state clearly all expectations and School-wide rules concerning conduct as well as the consequences of breaking the rules. The Code will play a crucial role in the creation of a rich culture and strong sense of fellowship within the Worcester Advantage Regional Charter School. Toward this end, students will also be asked to wear simple uniforms, which will permit them to focus their attentions on academics and on those aspects of their personalities that are truly important.

The general philosophy underlying the School's unique design is that every child has a right to an excellent education, that all students should be held to high standards, and that all children can succeed in school—if afforded the right opportunities.

The overarching goals of the Worcester Advantage Regional Charter School are to:

- Demonstrate the heights of academic achievement that public school students can routinely attain when the advantages of charter school governance are coupled with ambitious new academic standards
- Offer area families rich new choices in public education
- Create new professional settings for teachers that permit them to succeed, free from debilitating work rules, financial constraints, and excess regulation.

The Worcester Advantage Regional Charter School is committed to attaining, at minimum, the following outcomes with students enrolled since kindergarten:

- Average scores at or above the 70th percentile in reading, language, and mathematics on national standardized tests (such as the ITBS)
- 90 percent of students performing at or above the NAEP's "Basic" level in reading, writing, mathematics, science, history, and geography, and at least 35 percent performing at or above the NAEP's "Proficient" level
- Mathematics and science performance comparable with top-scoring nations in Asia and Europe
- Average School scores significantly above the Commonwealth's average on statewide assessments measuring student performance.

With its rich educational resources, high academic expectations for all students, and ambitious goals for student achievement, the Worcester Advantage Regional Charter School will offer the area's families a fundamentally different choice in K-12 public education. In so doing, the founders aim to revitalize public education and set the standard and the pace for school reform in Massachusetts.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

II. NARRATIVE

1. MISSION STATEMENT

The mission of the Worcester Advantage Regional Charter School is to demonstrate the heights of academic achievement that public school students can routinely attain when provided superior educational opportunities. Using honed curricula proven through research and Advantage Schools's state-of-the-art intranet technology, the School will offer area children a free, world-class academic education. Beginning with a K-5 school next fall, the Worcester Advantage Regional Charter School will expand by one grade each year; when fully developed, it will provide a comprehensive K-12 program. Students will be drawn from Auburn, Leicester, Millbury, Oxford, Shrewsbury, Sutton, and Worcester. The School's founders are dedicated to attracting a student body that is reflective of the area's student population in terms of race, ethnicity, and income level.

The Worcester Advantage Regional Charter School will demonstrate that the area's socially and economically diverse student body can achieve International Baccalaureate status or a technical skill certification upon high school completion. A solid academic grounding in the early grades will lead to mastery of the high school curriculum by the end of the tenth grade. At that point, students will select one of two career paths for the last two years of high school.

- Students planning to pursue a traditional college education leading to a bachelor's degree will enroll in the International Baccalaureate (IB) curriculum, the internationally recognized standard of excellence that prepares students for the most competitive universities in the world.
- Students intending to enter the workforce or pursue a technical degree following high school will choose a career path that integrates further academic work with intensive technical and work-based learning. Unlike most existing vocational education programs, the workforce skills curriculum will be designed and implemented in partnership with local and national business, ensuring that students will be trained to the highest skill standards and will gain a credential that is valued by employers.

Working in partnership with Advantage Schools, Inc., the School's education management provider, the founders aim to help set the standard and the pace for school reform in Massachusetts. Housed in a newly renovated facility, the Worcester Advantage Regional Charter School will be a beacon to the community—proof that, for the very same resources expended in the local traditional public schools, every child in the region can be afforded a public education equal to the very best in the world. Representative of the area's great diversity, the School's graduates will be prepared to participate fully in the economy and society of the next century.

2. STATEMENT OF NEED

Worcester, the hub of the region to be served by the Charter School, has a strong commitment to diversity and variety in public education. Since the 1970s, the city's school system has evolved from a homogeneous network of neighborhood-based schools to a varied community of magnet schools, each with its own academic emphasis. The magnet schools have afforded Worcester students opportunities for ungraded instruction, heterogeneous grouping, and focused education in art, music, science, technology, and computers.

Nevertheless, the Worcester Public School system is constrained by facility limitations and contractual obligations in the range of opportunities and concentration of resources it can provide. Today, only about 58 cents of every dollar spent by the Worcester Public Schools reaches the settings in which schoolchildren spend their days. Of this sum, 49 cents goes toward teachers' salaries, fixed costs, and student transportation—leaving only nine cents per dollar for non-personnel needs.

The 1996 results of the Massachusetts Educational Assessment Program (MEAP) tests reveal the impact of such institutional constraints on student achievement. On average, the city's eighth- and tenth-graders scored below the state norm in reading, math, science, and social studies. Moreover, the dropout rate for the Worcester Public Schools is 7.4 percent—more than twice that of the Commonwealth at large. In Worcester's surrounding communities, similar indicators have led parents, educators, and community members to seek new opportunities in education. In Leicester and Shrewsbury, average SAT scores for the Class of 1995 fell below the state norm, and in the Oxford Public Schools, eighth-graders scored below the Commonwealth's average on the MEAP tests in the crucial subjects of reading and mathematics.

Such statistics indicate the need for a school designed specifically to ensure that area students master basic skills and knowledge in the early grades, and that they are prepared for the rigors of college and the workplace upon graduation from high school. The Worcester Advantage Regional Charter School will fulfill this need, offering area families—for the first time in many

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

cases—a choice in public education. Indeed, while Worcester has experimented with various education reform initiatives over the past twenty years, offering families interesting choices through its magnet school program, children in surrounding communities have been consigned to their local public schools as a matter of geography rather than choice. Providing a world-class academic program to children across the region, the Worcester Advantage Regional Charter School will unite students from struggling schools and those from traditionally high-performing districts. In one safe, attractive new school, singularly dedicated to student achievement, children of all backgrounds—economic, racial, and social—will be joined in the common pursuit of knowledge. Our long-standing American aspiration of equal educational opportunity will be renewed—and realized.

Uniting children from several school districts is also essential for the creation of a school of scale, given the legislative cap on the percentage of district funds that can be dedicated to charter schools. The specific design of the Worcester Advantage Regional Charter School requires a large student body so that costs can be amortized and the greatest number of students possible can benefit from high-quality services and an extensive community network.

The School's use of the Direct Instruction approach in its elementary English and mathematics curricula will ensure that students master the fundamental skills necessary for success in later grades. The Direct Instruction approach is supported by an impressive body of evaluative research, which documents a high level of effectiveness with all levels of students. The largest federally funded study of instructional effectiveness ever conducted, *Project Follow Through*, found that Direct Instruction had the greatest impact among various comparison models on all three measures used in the study: basic skills, cognitive, and self-confidence. A recent metaanalysis by researcher Gary Adams analyzing 44 evaluations of the reading program found a large average effect size of .68 standard deviations compared to control groups.

In addition, the Worcester Advantage Regional Charter School is designed to level the playing field for students with limited English Proficiency (LEP); such students currently comprise 7 percent of the population of the Worcester Public Schools. The School will use "structured immersion," whereby LEP children learn English by immersing themselves in the spoken and written language. The immersion is "structured" because the level of English used is adjusted to the students' understanding of the language. Where this practice has been tried in other states, students not only learned English better and faster, but also scored higher on exams measuring subject matter learning than did students in Spanish bilingual programs. On average, the English immersion students were mainstreamed into regular classrooms in 3-4 years, compared to 6-7 years for the bilingual students. Furthermore, studies have shown that students with only a very basic English vocabulary can make remarkable achievement gains with the Direct Instruction Reading Mastery curriculum, which will be used at the School.

Charter school status will enable the School to achieve its ambitious goals for student achievement by affording it a significant level of autonomy and freedom from many of the constraints of existing collective bargaining agreements, central office rules, and state regulations. With the charter school, all the elements of an effective school—strong leadership, adequate resources at the school level, a high-caliber faculty, state-of-the-art facilities, a proven curriculum and pedagogy, an orderly environment, and a distinctive mission and culture—can be realized at once. In short, the Worcester Advantage Regional Charter School will be allowed—and expected—to focus on what matters most: teaching and learning.

Evidence of local demand for high-quality alternatives to the traditional public schools is found in the extensive wait list for admission at Worcester's only existing charter school. The best magnet school's in the city are similarly filled to capacity, and students from Worcester and surrounding towns are flooding two of the city's most highly regarded private schools, Bancroft Academy and Worcester Academy. In Shrewsbury, 14.5 percent of K-12 students are attending private schools, and the percentage of such students in Oxford and Sutton is nearly 10. These families have chosen to pay tuition, often at considerable sacrifice, to provide their children with the type of high-caliber academic program that will be offered for free at the Worcester Advantage Regional Charter School.

3. EDUCATIONAL PROGRAM

A. Educational Approach

Using the Direct Instruction approach in the earlier grades, the Worcester Advantage Regional Charter School will provide a challenging core curriculum for all students, based on practices proven through the best available research to be effective in attaining student outcomes. Clear, crafted lessons that engage the whole class will constitute the most efficient method for all students, regardless of background, to learn important concepts. While most learning prior to the tenth grade will follow a discipline-based instructional approach, students will also have opportunities to develop cross-cutting, workforce-related skills through such instructional activities as identifying and acquiring needed information, working as part of a team, managing limited

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

resources, and using technology and other tools. Periodic inter-disciplinary activities and projects will provide students with further opportunities to integrate knowledge and skills acquired from different subjects.

Specific academic objectives will delineate targeted learning, with students proceeding to subsequent material after attaining mastery. Students will be grouped on the basis of competency, ensuring that all students are challenged at an optimal level, and their mistakes will be corrected so that they may learn from them and advance. Explicit academic standards at each grade level will serve as the basis for promotion. Structured interventions, including additional opportunities for practice or tutoring, will ensure that students having trouble with the material are helped in a timely manner.

B. Curriculum

The Worcester Advantage Regional Charter School will provide its student body with a rigorous and supportive academic program designed to prepare students from all backgrounds for success in a world-class college preparatory or workforce skills curriculum in the School's senior high school. The Commonwealth's newly developed curriculum frameworks will be incorporated into the School's curriculum, providing basic standards for teaching and learning in mathematics, language arts, science and technology, health (which will be incorporated into the School's science courses), history and social science, the arts, and a second language. The School will use the Direct Instruction approach in its elementary mathematics and English curricula to ensure that students master the fundamental skills necessary for success in later grades. When the School is fully implemented, students will select one of two curricular career paths for the eleventh and twelfth grades—college preparatory or workforce skills—depending on their career goals.

Students planning to pursue a bachelor's degree will enroll in the International Baccalaureate (IB) diploma program, an internationally recognized standard of excellence, which prepares students for the most competitive universities in the world. The IB track consists of a comprehensive curriculum that includes the study of six subjects—world literature, a foreign language, math, science, history/social sciences, and an elective—as well as a theory of knowledge course, an extended research paper, and a community service requirement. Students not pursuing a college preparatory career path may still take individual IB courses in subjects that would be useful in their chosen technical career paths, such as the applied Math Studies and Math Methods subsidiary level courses.

Students intending to enter the workforce or pursue a technical degree following high school will choose a career path that integrates further academic work with intensive technical and work-based learning. Unlike most existing vocational education programs, the workforce skills curriculum will be designed and implemented in partnership with national organizations with expertise in cutting-edge workforce training, as well as carefully selected local employers and business representatives. Students will be trained to the highest national industry skill standards and will have at their disposal the in-school equipment and technology necessary to develop technical skills for the next century. Such equipment and technology will be acquired by the School as it expands to include grades ten through twelve. Upon graduation, students who have chosen the workforce skills path will possess a credential that will be at least as valued by employers as an associate post-secondary degree.

In the earlier grades, using the Direct Instruction curriculum, the School will provide a challenging core curriculum for all students, based on practices proven through the best available research to be effective in attaining student outcomes. Clear, crafted lessons that engage the whole class will constitute the most efficient method for all students to learn important concepts. While most learning prior to the tenth grade will follow a discipline-based instructional approach, students will also have opportunities to develop cross-cutting, workforce-related skills through such instructional activities as identifying and acquiring needed information, working as part of a team, managing limited resources, and using technology and other tools. Periodic inter-disciplinary activities and projects will provide students with further opportunities to integrate knowledge and skills acquired from different subjects.

Clear and specific academic objectives will delineate targeted learning, with students proceeding to subsequent material after attaining mastery. New students will be placed on the basis of competency, ensuring that all students are challenged at an optimal level. Students' mistakes will be corrected so that they may learn from them and advance. Explicit academic standards at each grade level will serve as the basis for promotion. Structured interventions, including additional opportunities for practice or tutoring, will ensure that students having trouble with the material are helped in a timely manner.

After completing a thorough evaluation of research-proven curricula, Advantage Schools selected Direct Instruction as the core component of its K-5 curriculum. The Direct Instruction curriculum consists of polished lesson plans that have been implemented successfully and refined for over twenty years. Direct Instruction uses a competency-based approach that ensures competence before students proceed to new material, but without delaying students who are ready to advance more quickly. The curriculum teaches basic skills, as well as more complex analytic strategies and competencies, *explicitly*, instead of assuming

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

students can develop such capacities with only limited adult guidance.

To encourage student engagement and to enable teachers to monitor student progress efficiently, the primary method of instruction involves a brisk pace and frequent student responses, punctuated by individual student responses. The amount of productive interaction between the teacher and students is maximized. Student motivation and self-confidence are enhanced dramatically in comparison to other approaches, even when contrasted with methods that place a higher value on student motivation than on academic achievement.

The Direct Instruction approach is supported by an impressive body of evaluative research, which documents a high level of effectiveness with all levels of students, but particularly with students from underprivileged backgrounds. The largest federally funded study of instructional effectiveness ever conducted, *Project Follow Through*, found that Direct Instruction had the greatest impact among various comparison models on all three measures used in the study: basic skills, cognitive, and self-confidence. A recent metaanalysis by researcher Gary Adams analyzing 44 evaluations of the reading program found a large average effect size of .68 standard deviations compared to control groups.

As Bonnie Grossen, Ph.D., University of Oregon, concludes in her exhaustive summary of comparative research on reading instruction and the Direct Instruction program overall:

Educational reformers search for programs that produce superior outcomes with at-risk children, that are replicable and can therefore be implemented reliably in given settings, and that can be used as a basis for a whole school implementation that involves all students in a single program sequence, and that result in students feeling good about themselves. The Follow Through [study] data confirm that Direct Instruction has these features. The program works across various sites and types of children (urban blacks, rural populations, and non-English speaking students). It produces positive achievement benefits in all subject areas—reading, language, math, and spelling. It produces superior results for basic skills and for higher-order cognitive skills in reading and math. It produces the strongest positive self-esteem of the [nine different] Follow Through [study] programs.

Following is a brief description of the School's course content.

English

English instruction in the early elementary grades will focus on teaching students to listen and read with comprehension, to write and speak clearly, and to spell correctly. Problem solving, reasoning, and literary analysis will receive greater emphasis beginning in the later elementary years. Reading Mastery, Reasoning and Writing, and Spelling Mastery, Direct Instruction curricula published by Science Research Associates, will form the backbone of English and language arts instruction. Basic skills will be taught to automaticity so students can focus on higher order analytic and creative skills. A distinctive approach to phonics will be used which minimizes the number of rules students are expected to remember while maximizing the texts that students are able to read. In addition, the curriculum's emphasis on classic stories and poems, including those from other eras and other countries, will engage students in the pleasures of reading while serving as a springboard for character education. Story plots with engaging characters are a natural catalyst for discussions of basic virtues, from such relatively straightforward topics as physical courage and perseverance in the early grades, to more complex concepts such as integrity, true friendship, and self-respect, in the later elementary and middle school years. In the middle and early high school years, a "great books" approach will provide high-quality content as well as an opportunity to master language style and complexity. All students will also receive formal instruction in speech and debate in the middle and early high school grades.

Mathematics

Students will develop math skills through a carefully structured and sequenced math curriculum. At the elementary level, Connecting Math Concepts, also a Direct Instruction program developed by Science Research Associates, will be used for mathematics instruction. Unlike traditional curricula, where a topic such as fractions is the focus for a few lessons after which it is assumed to have been learned and then dropped, multiple topics will be developed gradually, practiced for an extended period of time, and then integrated into later topics for review. Beginning in year three, students will use calculators in some activities, and extended projects will begin in year four. Similar to English instruction, basic math skills and algorithms will be learned to automaticity so students can concentrate on complex applications and problem solving. In the middle and early high school years, students will build on this powerful foundation to attain mastery over an advanced mathematics curriculum that includes the content traditionally covered in such courses as Algebra 1 and 2, geometry, and probability and statistics.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Science

Science will receive unusually heavy emphasis in the elementary years. Children's natural curiosity about the world around them will be encouraged and satisfied, while gradually being disciplined through the study of formal scientific methods and modes of analysis. Students will develop an understanding of important science concepts and basic science facts in the physical, life, and earth and space sciences. Students will first be taught key facts, concepts, rules, and principles in a specified area (e.g., elements of simple circuits in a unit on electricity). Once students demonstrate their understanding of the subject matter, they will be taught to apply their knowledge to a cognitive routine (e.g., building a simple circuit). Students will learn such skills as effective procedures for recording observations and for formulating and testing hypotheses through "hands-on" investigations and experiments (such as those contained in Scholastic's Science Place units). In kindergarten, students will study the seasons and the weather, plants and plant growth, animals and their needs, and the human body. Students will continue to explore these topics in greater detail in grades one and two; in these grades, the plant unit will be extended to include the identification of different trees and flowers. The science curriculum for grades one and two will also include units on geological eras, rocks, and dinosaurs. In grades three, four, and five, students will learn about measurement, temperature, phases of matter, electricity, the solar system, the earth, the relationship of living things to their environments, and the human body system. Fifth-graders will have a special extension to the solar system unit which includes more astronomy. Building on the elementary program, which is significantly more accelerated than that of most traditional public schools, students will complete the content covered in the typical high school science courses of physics, chemistry, and biology by the end of tenth grade. A special strand in the curriculum will focus on the scientific design, implementation, evaluation, and refinement of technological solutions to problems. Key instructional emphases will include connecting new science content with previously learned content as well as the integration of skills learned in the math curriculum.

History and Social Sciences

History and social sciences—including civics, economics, and geography—will be taught to all students. In the early elementary grades, history will be taught using a literature-centered curriculum that includes myths and folk tales from around the world. Fourth-graders will take a year-long world civilization course, which will include the study of nine civilizations: the Sumerians, Hebrews, Nubians, Mayans, Japanese, Chinese, Greeks, and Romans. In geography, students will learn to make and use maps, and to identify the borders and capitals of the U.S., other nations, and the American states. In fifth grade, students will take a formal history course in U.S. history, using Joy Hakim's exceptionally well-written series, *A History of Us*. This course will include Massachusetts state and local history and economics. Students will focus on developing an intuitive understanding of such basic economic concepts as prices, supply and demand, and trade between individuals. The study of the lives and actions of individuals, especially through biography, will also provide lessons in character. Civics, focusing on the founding documents and the individuals who played key roles in shaping our government, will be taught in the context of history. Sixth-graders will pursue a more comprehensive study of the dawn of human society and the oldest civilizations, including the Mesopotamians, Chinese, and Egyptians. Seventh-graders will focus on Greece and Rome. Eighth-graders will study Europe through the 19th century, including its interactions with non-Western nations in Asia, Africa, and the Americas. Ninth- and tenth-grade history will consist of an in-depth history of the U.S. through the present.

Foreign Language

All students will start instruction in a second language beginning in the second grade and continuing at least through the tenth grade. Such studies will emphasize communication in the elementary grades and culture in the middle and high school grades. Students will attain a high level of performance in both of these areas by the end of the tenth grade.

The Arts

All students will study the visual and performing arts, receiving instruction in music, visual art, drama, or dance through the tenth grade. The arts curriculum will reflect a balanced, discipline-based instructional approach that includes attention to production or performance, appreciation and criticism, and history and culture. All students will develop basic drawing skills and learn to play a musical instrument. The study of history and culture will be coordinated with the history curriculum, focusing on the greatest artistic works and accomplishments of the period and civilization being studied.

Physical Fitness

Students will be engaged in activities designed to perfect their coordination, increase their strength and stamina, and help them become team players and good sports. They will also participate on intramural and School teams, and in training activities and tests recommended by the President's Council on Physical Fitness.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

C. Teaching Methodology

The Worcester Advantage Regional Charter School will depart from the dominant philosophy in traditional public schools and schools of education today, which holds that teachers should devise their own detailed curricula and daily lessons to fit the needs of their students. This philosophy is based on the assumption that disparate students have disparate needs requiring individually tailored lessons that change from class to class and year to year. The students thus dictate course content and there is rarely sufficient continuity to measure progress, correct failures, or build on successful practices. Not surprisingly, while a few teachers have excelled using this approach, the results of the majority have been equivocal.

The founders believe that methods of engaging and successfully presenting subject matter and critical concepts to a broad range of students can be identified, broadly applied, and continually refined over time. The School's principal teaching method—teacher-led, subject-based instruction, enriched by student projects and occasional cross-discipline activities—will free teachers of the need to reinvent the wheel for each class or for particular students. A highly structured and proven curriculum, designed to meet the needs of a diverse student body, will answer questions of what students should be learning and when, permitting teachers to focus on facilitating student achievement.

In addition, as the School's management contractor, Advantage Schools will implement state-of-the-art technology likely to improve teacher performance and student learning. As in the private sector, technology will be viewed as a valuable tool, not an end unto itself. A modern intranet communication system integrated with the School's curriculum and pedagogy will be accessible to every teacher. Each teacher will be given his or her own telephone, fax machine, and laptop computer through which the School's intranet can be reached. Instructional methods and interventions will be available at any time through the system. Structured around the curriculum for ease of use, the communication system will permit teachers to discuss issues through on-line "chats," not only with teachers within the School, but also with those at other Advantage campuses across the country. Through this system, teachers will also be able to post questions to consultants or the Advantage central office. In subject areas of the curriculum having less structure, teachers will be able to construct on-line model lessons that could be posted for use by their peers, or for soliciting recommendations and improvements. Teachers will also be able to call up samples of student work from different teachers, which exemplify different levels of performance on the skills or knowledge in the lesson. Over time, such a library will encourage clarity of purpose, self-monitoring, and thus higher standards.

D. Assessment

The Worcester Advantage Regional Charter School will implement a comprehensive assessment system, which will accurately monitor student and School progress over time, provide information that is useful for guiding and improving instruction, certify that students are meeting academic standards for promotion, and express clearly the quality of student work that is expected.

The School will use a variety of assessment instruments, including the new Massachusetts Comprehensive Assessment System tests and any other assessments required by the Board of Education. Because of their ease of use, reliability, and unquestioned independence, the School will use norm-referenced standardized tests, such as the Iowa Test of Basic Skills (ITBS), as one component in its assessment. Pre- and post-testing of students will provide data on improvement in student performance.

The Worcester Advantage Regional Charter School will also conduct a fourth-grade assessment of its students, which will include released items from the National Assessment of Educational Progress (NAEP) and the Third International Mathematics and Science Study (TIMSS). In mathematics and science, this assessment will permit the School to report results in the context of the performance of students in top-scoring countries, as well as in other states and the nation as a whole. In other subject areas, including reading, writing, history, and geography, use of released NAEP items will permit reporting in the context of student performance in other states and nationwide.

The limitations of their short-answer format and their oblique relationship at best to the School's specific curriculum require that standardized tests be supplemented by other assessment measures. The Worcester Advantage Regional Charter School will implement customized assessments closely aligned with its own curriculum. The School will implement formal assessments—which will include a combination of short-answer questions and items that require lengthier, more sophisticated responses—at the end of each subject unit. Moreover, assessments for each student will be based on a carefully structured collection of student work including student papers, projects, and other assignments embedded in the curriculum.

The fullest measure of student performance will only be captured by the complete assessment system. In addition to clear, precise descriptions of the type and quality of student performance expected, a bank of examples of student works that demonstrate progressive levels of attainment will be available for the customized assessments. The selection and moderation process will provide

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

an important activity for teachers; eventually this activity will link faculty at the Worcester Advantage Regional Charter School with faculty at other schools served by Advantage Schools in different cities through the intranet computer network.

Once the assessment process is established, members of the community will periodically be invited to participate in the ongoing process of maintaining and refining the performance expectations by serving on judging panels. This process will serve to communicate the efforts of the School to the broader community, while also soliciting community input in setting expectations for student performance.

Students who do not perform adequately on state or other assessments will be provided additional learning time and instructional support, including further group instruction or individual tutoring.

To facilitate the assessment of student performance, Advantage Schools has developed an innovative tracking system aligned with the Direct Instruction curriculum. This system allows teachers, parents, and School administration officials to track closely the progress of individual students, classrooms, or the entire School against expected benchmarks established over DI's twenty-plus years of use. Using easily readable graphs and charts, with appropriate measures for student confidentiality, progress can be traced literally on a daily basis. This technology, unlike traditional pen-and-paper tracking, allows for quicker response times in cases where teachers are not delivering the lessons and classrooms are not progressing as expected.

When it first opens, the Worcester Advantage Regional Charter School will seek a transfer of its students' records from their former schools, including any Individual Education Plans and data on students' eligibility for participation in Title I and other entitlement programs. Advantage will establish and maintain a central, automated database for the creation and maintenance of all Worcester Advantage Regional Charter School records. Strict confidentiality of student information will be maintained as required by federal and state laws.

With fire-wall provisions for security and student confidentiality, the School's database will be accessible to each teacher through her or his notebook computer. From the database, Advantage and School staff members will be able to generate a variety of summary statistics and standard reports on School and student activities and performances. The School will be able to respond quickly to special requests for information under public school law, and to produce required public reports efficiently and accurately.

E. Students with Special Needs/Students with Limited English Proficiency

Service to students with special needs—whether limited English proficiency or physical, cognitive, or emotional disabilities—will be a vital part of the School's mission. A school that is truly public and open to all must endeavor to meet the needs of *all* its students.

In the view of the founders, compliance with statutory and regulatory requirements regarding students with special needs is not an impediment but a strength of the charter school statute. The playing field would be tilted—and any success the School demonstrated would be rightly questioned—if the School did not welcome students who might be more difficult and expensive to educate. The School will meet all requirements for serving students with disabilities. The School Director will make every effort to include those with particularly challenging Individual Education Plans (IEPs), and will consult regularly with the Department of Education to determine how students with severe disabilities can be best served. It is expected that the School will be able to accommodate nearly all students, and no decision to the contrary will be made without serious consultation with the Department.

Currently, over 17 percent of Worcester's public school students have special needs, and the percentage of such students in Oxford and Leicester is even higher (18.3 and 18.9 respectively). On average, nearly 14 percent of public school students in the other towns to be served by the School have been identified as having special needs. The founders believe that many students today are poorly served by SPED programs in regular public schools. Many of these students' needs could be met in the regular classroom, with appropriate supports.

Research has found that, for all practical purposes, the "learning disability" category accounts for many states' high enrollment in special education. This suggests that, rather than addressing the needs of these students in the classroom, many educators too quickly label children "special needs," taking them out of the classroom and away from their peers. Subsequently educated in segregated settings with low expectations, these students almost never return to regular classrooms.

Indeed, studies have shown that the majority of students enrolled in special education classes nationwide do not suffer from neurologically-based learning problems or physical handicaps. Rather, their difficulties are "the by-products of conflicts and rigidities in regular programs," as one researcher put it. The ways in which many schools are organized lead to the continuing failure of some children who in time are perceived as discipline problems, removed from regular education programs, and assigned to individualized special education programs that are of little value to them. High enrollment in special education occurs most

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

frequently in “administratively disrupted” schools, where teachers are denied the freedom and the tools necessary to perform effectively. In such cases, teachers often begin to doubt their efficacy in the schools. Such feelings of helplessness can lead to a destructive cycle of frustration, anger, and failure, resulting in the genuine breakdown of instruction and untold damage to the child.

In many district schools, regular and special education are locked in a vicious cycle of funding. As increasing numbers of children are referred to special education, more and more dollars are consumed by the mandate. Resources dwindle for regular education, class sizes expand, and remedial programs are cut. Too often, teachers have found that they have had no alternative but to refer students—whether in need of extra help, smaller classes, or personal attention—to special education. Special education has become, in many urban systems, a dumping ground for students who, alienated from the schools and embittered by the schools’ failure to teach them, have become disruptive and even violent. Once enrolled in special education, students are unlikely to return to the regular classroom. They exist in a separate system, deprived of the normal academic and extracurricular activities of their peers.

Excessive SPED enrollment, in other words, may be a result of a school’s dysfunction, not the students’. The absence of an effective curriculum and pedagogy, especially in the critical early grades, may result in SPED referrals by teachers and parents. When students are not taught how to read in the early grades, schools may later excuse their own failures by labeling children as deficient (a “learning disability”). Or students, trapped seemingly interminably in a classroom where both textbooks and blackboard are incomprehensible, may understandably “act out” in class (an “emotional disability”). In both cases, it is not the children who are deficient, but the children’s schooling.

The School’s founders believe that, while serving the same student population as regular public schools, special education enrollment can be lower in a charter school, and that most parents of special needs children simply want their children’s needs met. Many would prefer that their children remain in regular classrooms if they could be assured that the children’s needs will be promptly evaluated and appropriate modifications to the classroom completed in a timely fashion. The School will be well positioned to establish this trust and will devote substantial resources to pre-referral evaluation services, parent communication, and early intervention.

At the Worcester Advantage Regional Charter School, the use of the Direct Instruction curriculum will reliably reduce the requirement for remediation and sharply lessen inappropriate referrals of students to special education. This highly structured curriculum, built on proven lessons coupled with biweekly formal assessments, also includes detailed intervention procedures for assisting students who are not making adequate progress.

Clear and specific academic objectives will delineate targeted learning, with students proceeding to subsequent material after attaining mastery. New students will be placed on the basis of competency rather than age, ensuring that all students are challenged at an optimal level. Students’ mistakes will be corrected so that they may learn from them and advance. Structured interventions, including additional opportunities for practice or tutoring, will ensure that students having trouble with the material are helped in a timely manner.

The School’s orderly environment and inspiring culture will also result in more students succeeding in regular education and fewer being referred to SPED programs than in traditional public schools.

Advantage Schools, Inc., the School’s education management provider, has extensive experience with public policy and practice relating to special needs students. Advantage President Steven Wilson has written about addressing the needs of urban special education students in his book *Reinventing the Schools: A Radical Plan for Boston*, and in the Pioneer Institute’s recent *Agenda for Leadership*. In 1995, Wilson also drafted legislation to reform Massachusetts’s special education law, Chapter 766. Moreover, Advantage Chief Education Officer Theodor Rebarber is an expert on curriculum development and pedagogy for urban students, and Kathleen Madigan, Director of Curriculum and Instruction for Advantage Schools, is a nationally recognized expert in special education.

Like students with disabilities, those with limited or no English proficiency (LEP/NEP) will find in the Worcester Advantage Regional Charter School a rigorous and supportive academic program that allows them to achieve their full potential. In Worcester, 7 percent of the student population have been determined to have limited or no proficiency in English; this statistic translates into an alarming number of young people who are unable to perform ordinary classwork in the language used in nearly every facet of American life. The founders are committed to eliminating the language barriers that have prevented so many young people from achieving success in the classroom and the workplace, and the School will fully comply with all statutes and regulations regarding bilingual education.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Research shows that the majority of LEP parents charge their schools first and foremost with teaching their children English. They know that their children must master English to succeed in our mainstream English-speaking economy. According to a recent federal study of transitional bilingual education (TBE) programs, 41 percent of parents whose children were enrolled in these programs wanted their children to be taught only in English. Despite this, regular public schools often rely on what is in effect transitional bilingual education (TBE), a pedagogy that the founders believe is demonstrably less effective than other pedagogies for LEP students, such as structured immersion and two-way bilingual programs.

In some cases, LEP students are automatically enrolled in TBE programs, separated from their classmates, and provided very little English instruction each day. Children can remain enrolled in these programs for years, and sometimes for their entire school careers. Their English instruction is at times so inadequate that, even when they are returned to regular education classrooms, these students are diagnosed as "special needs" and shunted off to special education (SPED) programs from which they rarely return. By contrast, most European nations successfully mainstream non-native speaking children after just one year or less in special "reception" classes.

A vast literature exists on the efficacy of TBE programs nationally. The consistent finding is that TBE has not fulfilled its promise. Native language instruction for LEP students consistently shows equivocal results in student achievement and high school dropout rates for Latino students, and no evidence for the superiority of these programs over those using intensive English instruction.

In October 1995, New York City's Board of Education compared two similar groups of LEP students in a four-year study. One group was enrolled in ESL classes that provided English instruction from the first day of school through a special curriculum. The other group received native language instruction for the entire school day, except for a short lesson in English. At all grade levels, students enrolled in ESL classes exited their programs faster than those in the bilingual programs.

One of the most promising alternative practices and that which will be used at the Worcester Advantage Regional Charter School is "structured immersion," whereby LEP children learn English by immersing themselves in the spoken and written language. Under this proven practice, the immersion is "structured" because the complexity of the English is tailored by the teacher to the student's increasing comprehension; simple English is used at the very beginning, and more complex English is used over time as the student gains fluency. The native language is used principally to clarify instruction and provide a reassuring and affirming connection to the child's home language and culture. Where this practice has been tried in Texas, Washington, Virginia, and Florida, students not only learned English better and faster, but also scored higher on exams measuring subject matter learning than did students in Spanish bilingual programs. On average, the English immersion students were mainstreamed into regular classrooms in 3 to 4 years, compared to 6 to 7 years for the bilingual students.

Studies have shown that students with only a very basic English vocabulary—such as that which may be gained from 4-5 months of preliminary language instruction—can make remarkable achievement gains with Direct Instruction's Reading Mastery curriculum (see: Grossen, B. & Kelly, B.F. [1992], Direct Instruction in a Third World Context, *International Review of Education*, 38(1), pp. 81-85; and Grossen, B., & Kelly, B.F. [1992], Using Direct Instruction to Improve the Effectiveness of Teachers in South Africa, *South African Journal of Education*, 12(3), pp. 143-148).

Students with limited English proficiency will also benefit from being in an environment where the ability to speak multiple languages is valued: all students at the Worcester Advantage Regional Charter School will learn a second language, expected to be Spanish, beginning in the second grade. Thus, students whose native tongue is Spanish but who have successfully exited the ESL program, will be able to maintain, in fact improve, their Spanish proficiency.

If needed, the School will seek to recruit at least one of its regular classroom teachers with ESL certification. Exit of students from the ESL program will be determined through qualifying scores on Massachusetts Comprehensive Assessment System tests and other assessments used by the Commonwealth. Students whose scores match the Commonwealth's average reading performance will automatically exit the ESL program. Students whose scores approach the norm in reading may exit ESL program for a one-year "trial" period if it is determined that such a change is warranted.

Advantage Schools has knowledge of and experience addressing issues related to overcoming limited English proficiency. At the Phoenix Advantage Charter School, managed by Advantage, nearly 40 percent of the student body were determined to be LEP upon enrollment. Recent assessments have shown that all such students who have been enrolled in the School for at least one month are performing on target, meeting rigorous standards for learning and in many cases surpassing the high expectations of teachers and parents. Advantage President Steven Wilson has written about bilingual education issues in his 1992 book, *Reinventing the Schools*, and in academic journals on bilingual instruction. He is the author of Governor William Weld's 1995 legislation to reform

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Massachusetts bilingual education laws and provide parents and educators greater pedagogical choice in LEP instruction. As Executive Director of the Pioneer Institute for Public Policy Research, he also commissioned the Institute's study by Dr. Christine Rossell on the efficacy of Massachusetts's bilingual education programs.

F. Schedule and Calendar

The Worcester Advantage Regional Charter School will provide regular instruction 200 days of the year, compared to the standard 180 days provided by traditional public schools. The School's hours of operation during regular school days will be from 8:00 a.m. to 3:30 p.m. The School will be open from 7:30 a.m. to 6:00 p.m. for students and families who desire such access. An after-school program, outside of the regular school program and operated on a tuition basis with scholarships for families of limited means, will be available within the School.

Students in kindergarten at the Worcester Advantage Regional Charter School will study reading, language, math, social studies, science, and music in daily increments of 30 minutes each. Each day, in grades 1-5, students will study reading for 90 minutes, language and math for an hour each, spelling for 20 minutes, and social studies and science for 45 minutes each. Students in grades 1-5 will also have a 30-minute lesson in a foreign language three times a week, a 30-minute music lesson twice a week, and a 30-minute physical education class twice a week. (Please see tables in Appendix A.) In addition, the School's course of study will include art, character education, and computer training, incorporated into the regular instructional program.

4. ACCOUNTABILITY

A. Defining, Measuring, and Demonstrating Success

The Worcester Advantage Regional Charter School will undergo ongoing, continuous quality assessment by its Board of Trustees, Advantage Schools, parents, and community members. Through Advantage's system of comprehensive school assessment (discussed in detail above), the quality of the School's most important outcome—student performance—will be evaluated continuously. The School will report regularly to the Board of Education, providing information on its financial status and academic program and performance; these reports will include the results of standardized student tests and an assessment of the School's success or failure in meeting the goals and objectives set forth in its contract with the Board. The Board approves the School's charter and can revoke it for non-performance.

Advantage Schools will submit regular budget variance and other fiscal reports to the Board of Trustees for review and approval. Within 90 days of the end of each school year, a comprehensive audit of the revenues and expenditures of the charter school will be conducted in accordance with GAAP principles by a certified public accounting firm selected by the School's Board of Trustees. The results of each annual audit will then be forwarded to the Board of Education and other interested oversight agencies and outside observers.

In addition to reporting yearly results, the School will conduct a longitudinal study of student performance. The performance of a sample of students in each grade (selected to be representative of the region's public schools) will be tracked over the full course of its enrollment in the School. The performance of each cohort will be publicly reported.

All meetings of the School's Board of Trustees will be open to the public. In addition, there will be a parent representative serving on the Board of Trustees who will keep the Board apprised of parent involvement and concerns. It will be a goal of the School to invite conversation at these meetings from community members and parents regarding their views on the School. The Worcester Advantage Regional Charter School will invite members of the area's diverse organizations, businesses, and educational institutions to serve on School evaluation panels. Input from these panels will help School managers remain aware of the public's impressions and concerns regarding the School.

The School's ultimate accountability is to parents through choice. If the Worcester Advantage Regional Charter School does not maintain the confidence of its customers, its viability will be threatened, and rightly so. The School Director and staff will consult regularly with parents to ensure that they are pleased with the progress their children are making and to act if they are not. Surveys of parents and students will provide additional information on customer satisfaction.

B. Key Performance Objectives and Progress Indicators

The Worcester Advantage Regional Charter School is committed to attaining, at minimum, the following achievement benchmarks with students enrolled since kindergarten: average scores at or above the 70th percentile in reading, language, and mathematics on national standardized tests (such as the ITBS); 90 percent of students performing at or above the NAEP's "Basic" level in reading, writing, mathematics, science, history, and geography, and at least 35 percent performing at or above the NAEP's

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

“Proficient” level; mathematics and science performance comparable with top-scoring nations in Asia and Europe; and average School scores significantly above the Commonwealth’s average on statewide assessments measuring student performance, including the new Massachusetts Comprehensive Assessment System tests. The chart in Appendix B lists the broad academic goals described above, with *samples* of matching objectives that students will be expected to attain. There is not enough space to provide the detail necessary to include every learning objective, as the School’s curriculum contains hundreds of precise objectives. For example, there are 129 objectives for writing at the fifth-grade level. The samples, therefore, far from being a complete list, are meant simply to exemplify the kinds of activities that students will be performing. The thousands of detailed objectives are available upon request. The School’s progress will be measured on the basis of these clearly defined goals for student performance. Upon the achievement of these ambitious objectives, the School will be considered a success by its founders and its customers (students and parents).

C. Meeting Goals

To ensure that it meets its goals, the Worcester Advantage Regional Charter School will draw from the many resources available to strengthen its curricular offerings and create an environment conducive to learning. Kathleen A. Madigan, Ed.D., Director of Curriculum and Instruction for all Advantage Schools, will oversee curriculum development at the Worcester Advantage Regional Charter School. Dr. Madigan has over 20 years experience in general and special education environments. She is also a nationally recognized expert in Direct Instruction and school-wide implementation using research-based practices. In addition, Advantage Chief Education Officer Theodor Rebarber is an expert on curriculum development and pedagogy for urban students.

The School’s professional development coordinator, to be hired after the School is chartered, will be an authority in Direct Instruction and staff management and training. This individual will organize two weeks of professional development for all faculty in July and August, including sessions on the School’s philosophy and culture (discussed in detail under “School Environment”), the curriculum, student assessments and student portfolios, and lesson delivery. Leading specialists will be engaged to conduct workshops and to address the staff. The professional development coordinator will serve as a permanent, on-site coach for teachers, going from classroom to classroom working with them and helping them to hone continuously their instructional skills. An annual national conference will also unite teachers from Advantage schools across the country for professional development and networking.

5. SCHOOL ENVIRONMENT

A. School Ethos

Because charter schools are chosen by both their customers and their employees, there exists in such schools a great opportunity to forge a vital and distinctive community. This community can be of special importance in an urban setting, where students may come from weak or broken families. A school’s community, as James Coleman has noted, can substantially reinforce that which is provided by the family. The Worcester Advantage Regional Charter School will create a community at once loving and demanding, where the following ten character virtues are cultivated with care and consistency: responsibility, perseverance, respect, kindness, truth, good citizenship, courage, self-discipline, fairness, and true friendship. The School will provide a focused, disciplined environment conducive to its primary mission: student learning.

Consistent with this philosophy, all students will be asked to wear simple uniforms. Far from diminishing their individuality, uniforms will permit students to focus their attentions on academics and on those aspects of their personalities that are truly important. And just as important for a school of choice, parents want uniforms and believe in them.

B. Code of Conduct

The Worcester Advantage Regional Charter School’s Code of Civility will state clearly all school-wide rules governing student behavior, including any infractions that may result in suspension or expulsion. The title of the code indicates an important distinction between this document and others that focus exclusively on physical behavior. The founders believe that clear, unambiguous rules, along with predetermined consequences for breaking the rules, are essential to a well-functioning code. The founders reject, however, the notion that such a code should be, or even can be, a purely behavior-oriented document. Students are moral and ethical agents, acting in a moral and ethical environment at school. Any rules governing student behavior can only be fully grasped, and are certainly best followed, when they are widely understood in their moral context.

Furthermore, the code must support and reinforce the primary mission of the Worcester Advantage Regional Charter School: rigorous academic learning by its students. Therefore, the School will disallow behavior that threatens that mission, such as plagiarism or disrespectful comments toward a teacher—even if such behavior might be judged differently if performed in a different context or directed toward a different individual. Finally, the Code of Civility connotes a higher standard than the avoidance of

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

physical harm or disruption among students. Students must be civil toward one another at all times, and in so doing establish the habits that characterize a civil society.

The code—the text of which will be finalized in consultation with the School Director, once he or she is appointed—will also include the overarching academic and non-academic goals of the School. While there will not be defined consequences for violating these ideals, they will serve as a clear reminder of the higher standards toward which all members of the school community should aim. Furthermore, next to each explicit prohibition in the code, there will be a succinct rationale, including any moral or ethical dimensions.

The Code of Civility will also include descriptions of the roles and responsibilities of faculty, staff, and parents. Copies of the code will be sent home with all students in the fall, and every student and his or her parent or guardian will be asked to sign a statement agreeing to the rules and expectations outlined therein. The code will thereby serve as a contract among the various members of the School community.

6. ENROLLMENT

A. Size of the Student Body

During its first year of operation, the School will enroll 546 students. The size of the student body will increase by 90 students each year thereafter as one grade is added per year. When fully developed, the School will provide a comprehensive K-12 program, serving 1176 students.

B. Student Recruitment

To attract a sufficient pool of students, the founders and Advantage Schools will initiate an aggressive public information campaign that will include visits to Worcester area community groups, associations, employers, churches, and social-service agencies to speak to these groups' members and encourage local children to apply for admission. Information packages will be produced and provided to local news and information media, including local cable access television. These packages will include a mission statement; summaries of the curriculum, faculty, facility, and transportation services; and other pertinent information. In addition, public information nights will be held in the spring, during which potential students and their parents will be able to meet School leaders and have their questions about the School answered, and informational phone numbers will be established.

As much as possible, the School's outreach efforts to the region's ethnic and minority communities will be conducted through direct personal contact with these communities' leaders and representatives, in an effort to build lasting relationships with their constituents.

Throughout the campaign, Advantage will operate a centralized tracking and customer service effort, which will produce and disseminate information, receive phone calls from parents or other community members, and enter and track student inquiries and applications.

Advantage Schools has extensive, proven experience with such outreach efforts. Similar efforts to attract a diverse student body to Advantage's Charter Public School in Rocky Mount, North Carolina, and the Phoenix Advantage Charter School in Phoenix, Arizona, resulted in schools with student populations that closely mirror the ethnic compositions of the surrounding communities. These campaigns generated intense interest in the schools and in charter schools in general. Similarly, Advantage's President Steven Wilson helped lead the student recruitment campaign at the Boston Renaissance Charter School, Massachusetts's largest charter school. That effort resulted in an applicant pool of 2,000 students, which reflected the ethnic makeup of Boston's population. All of these campaigns were conducted without the use of quotas of any kind, yet resulted in student bodies reflecting the cities' larger student populations.

C. Student Enrollment

The Worcester Advantage Regional Charter School will be open to all children, on a space-available basis within each grade. The School will not discriminate on the basis of sex, ability, national origin, race, religion, creed, or any other basis prohibited by law.

There will be no admission requirements, and no tests of any sort will be given to determine whether or not admission will be granted, although tests will determine placement. If there are more eligible applicants than available slots, the School will conduct a lottery to determine who will be admitted. The lottery will be open to all, will not rely on computers, and will be easily understood and followed by all observers. All students whose applications were filed by the application deadline will be separated by grade and entered into the lottery. A drawing of names by grade will then be held until all spaces are filled, with preference given to

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

siblings of admitted students. Once all spaces are filled, the drawing of names will continue to establish a waiting list. Students will be placed on the waiting list in the order their names are drawn. Students whose applications are received after the deadline will be placed on the waiting list in the order that their applications are received. In each successive school year, students who were enrolled in the Worcester Advantage Regional Charter School the previous year will keep their spaces in the School until they graduate.

7. LEADERSHIP AND GOVERNANCE

A. Governance

The founding coalition believes that the roles of the board of trustees, management, and staff in any well-managed organization are distinct:

- The board reviews and sets overarching policies, approves an annual budget, and hires and fires management
- Management negotiates and manages contracts, supervises staff, and runs daily operations
- Staff are responsible for directly carrying out the mission of the organization.

At the Worcester Advantage Regional Charter School, the Board of Trustees will: exercise final legal responsibility for the School and its performance; provide leadership for the project in the community; promote awareness of the School's new educational opportunities among local families, civic and political leaders, and the media; define the School's mission and set broad policy; adopt the School's strategic plan; oversee the contracts held by the School; and participate in School development activities.

It is the experience of the founders that small boards create a more effective body for managing an emerging organization such as the Worcester Advantage Regional Charter School. Accordingly, the Board will begin with a limited number of individuals, chosen because of their unyielding commitment to education reform and their leadership in the community. The Board is diverse and will remain so throughout the School's development.

The Board will contract out in their entirety the business operations and the academic program of the Worcester Advantage Regional Charter School to Advantage Schools, Inc., a national education management provider. Advantage will, therefore, be responsible for the daily operations of the School, leaving the Board free to focus on the broader issues mentioned above. The Board will be free to terminate Advantage's contract—and contract with a different provider—if Advantage fails to perform.

As staff to the Board, Advantage will be responsible for obtaining financing and overseeing the renovation of the School building; recruiting and managing the School staff; developing the academic curriculum; and contracting for food services, transportation, and building management. Central business and administrative services will include financial planning and reporting, accounting, procurement, and payroll and benefits management. Working with the Board of Trustees, Advantage will mount an intensive and sustained effort to recruit exceptional teachers and other staff to join the School and to participate in its attempt to create a model for public education. Advantage will also oversee an aggressive student recruitment campaign, abiding by all laws and regulations concerning student enrollment and the use of a lottery.

B. School Leadership

Vital to ensuring the success of the Worcester Advantage Regional Charter School is the selection of a strong and vibrant School Director. Candidates for this position will be recruited from across the Commonwealth and the nation after the School is chartered, as the founders and Advantage Schools use their extensive network of educational experts and contacts in the field to identify men and women of the highest caliber, who possesses the following:

- A record of leadership and sound management in an urban educational setting
- Strong public relations and interpersonal skills and experience in team-building
- An understanding of the diversity and unique character of the School community
- A passion for helping students attain high standards
- Consistently exceptional professional evaluations
- Outstanding references from peers, former colleagues, parents, and members of the School community.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

C. Job Descriptions of Key Personnel

A description of the Board's responsibilities and functions is provided above, under "Governance." The School Director will report to Advantage Schools and will bear chief responsibility for implementing the School's education program; attaining the School's objectives for high student achievement; managing, evaluating, promoting, and terminating School personnel; creating a School culture that is disciplined, orderly, and conducive to learning; and nurturing a strong relationship among the School, parents, the community, and the media.

The School Director will oversee and work with the on-site business manager to ensure that the School's targets for financial performance are met. The business manager will have overall responsibility for the business operations and finances of the School, including the management of student information and financial accounting systems, budgeting, purchasing, and contract management.

The Director will also oversee and work closely with the School's professional development coordinator, an expert in Direct Instruction and staff management and training. This individual will serve as an on-site, permanent coach for teachers, going from classroom to classroom working with them and helping them to hone constantly their instructional skills.

8. CAPACITY

A.. Experience of Applicant Group

The founders of the Worcester Advantage Regional Charter School include representatives of Greater Worcester's higher education, legal, and business communities, as well as the public and nonprofit sectors. Each is active in civic affairs and committed to improving the region's K-12 public educational offerings. Their professional expertise, leadership in the community, and commitment to education reform have been vital to shaping a school design that will fulfill the specific needs of the region.

Advantage Schools was hired by the Board to manage the School throughout the pre-opening phase and once the School is opened; the principals of Advantage are therefore not part of the applicant group. The founders and management of Advantage Schools will add to the experience of the applicants, bringing to the Worcester Advantage Regional Charter School their considerable expertise in charter school management, education, and the competitive contracting of public services. Among the principals of Advantage Schools are nationally recognized experts in charter school legislation, education policy, curriculum, and Direct Instruction in particular. Full resumes of Advantage's senior executives are provided in Appendix D. Advantage will draw from its experience at the forefront of the charter school movement to ensure the School's success.

Advantage Schools opened its first charter schools last fall in Rocky Mount, North Carolina, and Phoenix, Arizona—just six and nine months after they were chartered, respectively. Each school, based on the same model, enrollment, and partnership structure as that proposed for the Worcester Advantage Regional Charter School, will serve over 500 students in its first year, in spectacularly renovated facilities. Advantage is under contract to manage the Jersey City Golden Door Charter School in Jersey City, New Jersey, and has received charters to operate schools in Chicago, Illinois, and Kalamazoo, Michigan; the three new schools will open in September 1998. In addition, Advantage has received conditional approval for a new charter school in the District of Columbia, scheduled to open next fall, and plans are well underway for two Advantage schools in North Carolina.

B. Experience of the School's Board Members

Peter Lukes, Partner, Lukes & Lukes, L.L.P.

Mr. Lukes is a partner at Lukes & Lukes in Worcester, where he specializes in divorce, probate, and civil litigation. Prior to joining the firm, Mr. Lukes was a Law Clerk for the Attorney General of the Commonwealth of Massachusetts in the Public Charities Division. He has also served as a Judicial Clerk for the Commonwealth's Court of Appeals, a Legal Intern for the Suffolk County District Attorney's Office, and a Law Clerk for Commissioner Frank Scharaffa of the Appellate Tax Board. Mr. Lukes is active in civic affairs and has an extensive network of colleagues and associates in the legal profession who share his commitment to education reform.

Mark L. Cheffers, Founder, MLC Associates

Mr. Cheffers served as a Senior Accountant at KMG Peat Marwick and Price Waterhouse before founding his own consulting firm, MLC Associates. He earned his MBA from Harvard University and is a certified public accountant. Mr. Cheffers offers extensive experience in business auditing, consulting, financial services, and entrepreneurial activity, as well as connections to the higher education and business communities. He has served as an instructor in Anna Maria College's MBA program and a

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

speaker for Business Ethics courses and conferences. As the father of eight children, Mr. Cheffers has been involved with Worcester area schools, and he is dedicated to their improvement.

Mary Elizabeth Burke, Lecturer, Assumption College

As a Lecturer at Assumption College, Mrs. Burke represents Worcester's higher education community. The mother of six children, she has been active in civic affairs and has served as a vocal proponent for change in the local public schools. Mrs. Burke is a regular panelist on The Forum with Ara Eresian, a political talk show aired in Worcester.

Jennifer A. Knowles

Mrs. Knowles has lived and worked in Worcester since 1987. As part of the residential staff at YOU, Inc., a local social service agency which works primarily with homeless teen mothers, Mrs. Knowles has served as case manager, mentor, and educator. Her experience with young people in need, who in many cases have fallen through the cracks in the area's traditional public schools, has deepened Mrs. Knowles's commitment to improving the quality of public education for children throughout the region.

Michael Pakaluk, Associate Professor, Clark University

As an Associate Professor of Philosophy at Clark University, Michael Pakaluk represents Worcester's higher education community. He is a graduate of Harvard College and Harvard University's Graduate School of Arts and Sciences, and is widely published. Dr. Pakaluk is also the recipient of numerous awards and honors. As the father of six children between the ages of 4 and 16, he maintains an abiding interest in the local public schools and is committed to meaningful education reform.

Rosemary Rosario, Housing Court Specialist/Mediator, Worcester County Housing Court

Fluent in Spanish and an expert in communication, Rosemary Rosario has been an effective advocate for Worcester's Hispanic community for over ten years. Ms. Rosario's commitment to the Worcester Advantage Regional Charter School project stems in large measure from her belief that Latino children throughout the region will benefit from the School's unique design. From 1983 to 1984, Ms. Rosario worked at Pernet Family Health Services, advising the agency's Executive Director on the needs of Worcester's Hispanic population and developing and managing a health program for local Latino families. Ms. Rosario continued to serve the area's Hispanic population and others in need as a counselor at the Housing Information Center in Worcester from 1984 to 1985. Since 1985, she has been employed as a Housing Court Specialist and Mediator for the Worcester County Housing Court.

The Board members were chosen because of their unyielding commitment to education reform and their leadership in the Greater Worcester community. Over the next several months, additional individuals will likely be added to the Board. Each will be civic-minded; representative of the community at large; and interested in improving the quality of public education opportunities for all children, particularly those of modest means and those whose needs are not being met by the traditional system. Prospective Board members must possess a firm belief in the value of choice, competition, and local management of public schools. The initial founding group has already begun discussions with such people. Full resumes of the aforementioned Board members are provided in Appendix C.

C. Potential Partnerships

The School's founders and Advantage Schools will actively seek to develop partnerships with local businesses and nonprofit organizations to extend the opportunities for learning and enrich the educational experiences of the School's students. It is expected that as in Advantage's other schools, local business people and leaders of nonprofit groups will open doors for the School's staff and students to a rich array of community, cultural, and social organizations. Such individuals will also be contacted as possible sources of donated materials, equipment, and tutoring and mentoring services. School/business partnerships will not only benefit the students, they will enrich the community and the Commonwealth at large. Indeed, as eventual consumers of the new School's product, local business people will help shape the School's education design to fit the employment and continuing education opportunities of the next century.

9. FACILITIES AND STUDENT TRANSPORTATION

A. Viable Options for School Facility

On behalf of the Board of Trustees, Advantage Schools has recently completed an extensive site selection process, and a possible location for the Worcester Advantage Regional Charter School has been identified. Advantage is currently performing detailed design analysis and due diligence on the property, which is located at 664 Main Street in Worcester, and discussions with

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

the owner are underway. While this facility is being considered as the primary option, two other sites are being evaluated to ensure that suitable alternatives are available. The alternate sites are located at 1 Brussels Street and 330 Franklin Street in Worcester.

B. Characteristics of Potential Sites

In evaluating potential facilities, the founders have sought a central location and close proximity to regional roadways to ensure that the School is well-positioned to serve students throughout the region. Additional factors considered in the site selection process include surrounding land use compatibility, access and egress to and from the site, the cost of necessary improvements, and expansion potential to accommodate additional grades and a growing student population.

The facility at 664 Main Street is a roughly 40,000 square-foot, four-story building located on an approximate 1.5-acre parcel of land. The facility at 1 Brussels Street is a 64,000 square-foot, four-story textile mill, located adjacent to Route 290, across from the College of the Holy Cross. The facility at 330 Franklin Street is a 75,324 square-foot, single-level warehouse space, located on a 3.8-acre site within ¼ mile of Route 290.

C. Renovations

The building at 664 Main Street will require renovation, including electrical, plumbing, mechanical, fire and life safety systems, and ADA compliance improvements. The existing structure is suitable to provide necessary classrooms, offices, multi-purpose rooms, rest rooms, a library, and storage space for the School. The site is large enough to accommodate necessary parking, a playground, and the expansion of school facilities as the student population increases. Upon the completion of planned improvements, the Worcester Advantage Regional Charter School will offer students and teachers a virtually new, state-of-the-art learning environment. The School's founders believe that public school buildings should symbolize to children and their families the best of the adult world and its achievements. In keeping with this philosophy and as it has done for its other schools, Advantage will tap the expertise of national leaders in school design to transform the existing facility into a school befitting education in the age of technology; the costs of renovation will be assumed by Advantage Schools. Advantage charter schools in Arizona and Rocky Mount stand in sharp contrast to the many neglected and unattractive public schools nationwide. At each location, Advantage oversaw the creation of 50,000 square feet of stunning new school space.

A. Transportation Services

As part of its engagement with the Worcester Advantage Regional Charter School, Advantage Schools will be responsible for developing and implementing the School's transportation plan. A comprehensive plan will be finalized by April, and will be submitted to the Department of Education at that time. Information about transportation services will be provided to prospective students and their families in the School's marketing packets.

10. A DAY IN THE LIFE OF A STUDENT

Following is an account of a day in the life of Isabelle M. Lurning, a typical second-grader at the Worcester Advantage Regional Charter School.

Isabelle arrives at School at 8:00 a.m. and proceeds to her classroom, bright-eyed, eager, and ready to learn. After she and the other students are settled in their seats, Isabelle's teacher takes a quick roll call, entering the attendance data directly into her laptop computer so the School's records will be immediately updated. The class is then divided into small groups of about ten students each for reading instruction. Isabelle joins the Red Reading Group and opens her Reading Mastery III workbook, part of the Direct Instruction curriculum. Having learned how to read using phonics, Isabelle no longer has to sound out every word, and she has little difficulty following along as another child reads part of a story from the book. Soon it is her turn, and Isabelle jumps in to continue the narrative. As the lesson continues, the teacher tests the students' literal comprehension with questions about the characters and the actions taking place in the story. Isabelle answers several questions correctly and is immediately praised by her teacher. When another student responds incorrectly, the teacher explains why her answer is wrong and ensures that the students understand this explanation before moving on.

At 9:30, Isabelle turns her attention to Reasoning and Writing, part of the Direct Instruction language program. For this class, Isabelle moves to another small group composed of students who possess the same level of aptitude in this area as she. The teacher reads a story from the Reasoning and Writing B-1 workbook, and then peppers the students with questions about the characters, the story line, and the grammar used by the author. The story is a continuation of the one they were read the day before, and like the previous day's, it ends as a cliffhanger. After the questioning is concluded, Isabelle and the other students engage in a writing exercise related to the story they just heard. The exercise requires that Isabelle follow multiple instructions, so she is glad that she not only listened carefully to the story but paid close attention to the teacher's directions. Isabelle's parents have noted that

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

her listening skills have improved since she enrolled at the Worcester Advantage Regional Charter School. Isabelle understands that she will have to edit and rewrite the piece of writing she is doing today as she has learned to do throughout the course. Sometimes she even surprises herself with the extent to which she can improve upon her own work over time.

At 10:30, Isabelle joins another small group for math instruction. Earlier this week, she finished the 60th lesson in Connecting Math Concepts-B (part of the Direct Instruction curriculum), and yesterday she passed the test for Lesson 60 with flying colors. Today, Isabelle's group is beginning a new and more challenging workbook, which will cover such topics as missing digits and identifying row and column designations for cells in a table. The teacher leads the group in a fast-paced question-and-answer session, and Isabelle chimes in with her classmates to provide choral responses. Then the teacher gives a story problem and asks Isabelle alone to figure out the answer. Isabelle likes these kinds of problems, and her parents appreciate the fact that such exercises are laying the foundation for thinking algebraically. Once the students master the foundation skills in the new lesson, they are given problems to complete individually and in small groups.

Isabelle has a rather unfortunate experience during lunch, when another student demonstrates his anger at being denied part of Isabelle's dessert by spilling milk on her tray. The teacher supervising the cafeteria responds to the situation by verbally reprimanding the boy and explaining the importance of handling one's anger calmly and without harming oneself or others. After the boy apologizes, he agrees to empty Isabelle's lunch tray in the trash after she is finished for one week, as restitution for his infraction. Isabelle knows that restitution is an important part of her School's Code of Civility.

After lunch, Isabelle joins her classmates on the playground for recess. She and her friends practice the "green sleeves dance," an Old English dance they are learning in physical education class as part of their study of dance from different eras and cultures. Isabelle has already learned the Virginia Reel and the tango by heart.

After recess, Isabelle's class devotes thirty minutes to character education. This month, Isabelle and her classmates are focusing on the virtue of kindness. After reading *The Lion and the Mouse* last week, they created a story re-telling chart identifying the characters and the plot of the story, as well as the ways in which the story helps illustrate why kindness is important and how it is practiced. Today, Isabelle uses the chart to re-tell *The Lion and the Mouse* before the class. Then she and her classmates exercise their artistic skills by creating their own illustrations for this classic story. While the students are working, their teacher talks about the project the class will engage in over the course of the month to help practice kindness. Isabelle listens as her teacher describes how the students will collect warm clothing to donate to area foster families as part of the SHARE Project.

At 12:30, the School's foreign language teacher enters the classroom to lead a conversational class in Spanish. Isabelle learned the "Good Morning Song" in Spanish class earlier this year, and today the students practice the "Counting Song." When called upon, Isabelle introduces herself in Spanish and is able to begin a simple conversation.

Isabelle's classroom teacher returns at 1:00, and the students begin their science lesson in the usual way by recording today's local weather. In addition to learning how to graph weather patterns, Isabelle has also learned about the climate in other parts of the country as she and her classmates have swapped weather information via the Internet with students at other Advantage schools nationwide. After the students complete their recording tasks, Isabelle's teacher begins a lesson on geology, explaining the difference between igneous, metamorphous, and sedimentary rocks.

At 1:45 she takes out her history text, written by Joy Hakim. Isabelle likes this book because it includes many narrative accounts of historical events, which give her the sense of being present as the events unfold. Today, Isabelle's class is continuing its study of the first American colonies. The teacher reads a short story about Roger Williams and the settlement of Rhode Island; the narrative leads into a class discussion of how the experience of Williams and others, who were denied the freedom to practice their own religion, led to the guarantee of those liberties we enjoy today. The teacher then divides the class into groups and assigns each a colony for which it must create a travel brochure with text and pictures. Isabelle is part of the Pennsylvania group, and for the rest of the period, she and her cohorts brainstorm about the facts and illustrations they will include in the brochure. Isabelle wants to write about William Penn and the Quakers, and a boy in the group is going to download a map of Pennsylvania from the World Wide Web on their classroom computer.

Isabelle's teacher begins the daily spelling lesson at 2:30, which is followed by a half-hour of review and handwriting practice. When the bell rings to signal the end of the school day, Isabelle gets her coat and lines up at the door, talking quietly with a friend about the homework they have for that night. Isabelle checks her backpack to be sure she has her recently returned math test to show her parents. She sees it inside the pack with "100%—Excellent!" written in bright red ink on the top of the front page. Her smile lights up the hall as she walks to the bus.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

III. BUDGET, FINANCIAL MANAGEMENT, AND HUMAN RESOURCES

1. BUDGET

A chart outlining projected revenues and expenditures for the Worcester Advantage Regional Charter School is provided in Appendix E.

2. BUDGET NARRATIVE

A. Justification of Expense Projections

Expense projections for the Worcester Advantage Regional Charter School are based on Advantage Schools's experience in charter school management; a thorough review of the Commonwealth's amended charter school legislation; and extensive research into the costs of high-quality faculty and staff, services, and goods necessary to operate a world-class charter school. Dollars are held constant. Following are specific assumptions included in the table of projected expenditures (Appendix E).

Professional Salaries

Year One projections assume a School Director with a salary of \$65,000; 19 full-time teachers with an average salary of \$37,474, increasing by three teachers per year as additional grades are added (one grade per year); one music, one Spanish, and one physical education teacher at \$35,000 each; and eleven Instructional Assistants at \$18,000 each, increasing by one per year as additional grades are added. Supervisors include a Professional Development Coordinator at \$40,000; a Business Manager at \$40,000; and a \$40,000 Technology Manager, hired part-time in Year Two and expanding to full-time in Year Four (technology development and support will be handled primarily by Advantage Schools). In addition, the School will open with one full-time special education teacher; it will eventually staff two full-time special education teachers as the number of students increases. An average of \$130 per student in contracted special education costs is also budgeted.

Payroll and taxes are calculated at 19.43 percent of all staff, and will include health, preventative dental, legal, life, and disability insurance, as well as the employer's matching contribution to the 401(k) plan.

Administrative Staff

Initially, there will be one full-time clerical position at \$28,000. In Year Two, one and one-half additional clerical positions will be added; in Year Three, three full-time clerical positions will be funded. Many of the clerical tasks performed by on-site staff in traditional public schools will be handled in a centralized fashion by staff at Advantage Schools for all charter schools under the company's management. A full-time custodian will be hired in Year One, with additional help in out years; additional funds have also been budgeted for custodial supplies and services. Other costs projected include medical and librarian positions: one nurse with a salary of \$30,000 will be hired in Year One; an additional nurse will be hired by Year Four; and a part-time librarian will be hired in Year One, at \$28,000, a position which will expand to full-time by Year Two.

Facility

Facility costs include rent at \$627,487 in Year One, expanding to \$670,909 in Year Four as additional space is required. The School will lease the facility from the building owner. Acting on behalf of the Board of Trustees, Advantage Schools will broker the lease, secure financing, handle facility renovations and build-out, and manage debt service. Insurance is projected at \$80 per student (slightly less in Year One because of the projected building occupancy date). Utilities are budgeted at \$80 per student.

Materials and Supplies

Projections for textbooks, office and classroom technology, and classroom furniture assume that these materials will be leased. Textbooks are projected at \$135 per student (increasing as student enrollment grows), paid over 2.5 years at 8.25 percent. Computers are projected at \$307 per student, paid over three years at 6.5 percent. Classroom furniture is projected at \$306 per student, paid over four years at 6.75 percent. The projections conservatively assume that the School will release the equipment upon the expiration of the lease, though a more favorable arrangement will likely be negotiated. Instructional equipment, which includes all teaching materials not related to the Direct Instruction curriculum, is projected as a direct purchase at \$103 per student. These costs and terms are all conservative projections, based on actual experience. Other equipment includes postage and shipping, telephone equipment and usage, non-computer office equipment (e.g. fax, copier, postage meter), and office supplies.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Other Costs

This application assumes that the School will provide transportation for the region, including the district in which the School is located. Because of the importance to parents of high-quality transportation and because of the variability of transportation costs and routes of special needs students, transportation per capita is very conservatively estimated at \$458 per student.

Contracted services, provided through Advantage Schools, include contracted special education services (\$70,980 in Year One), ongoing curriculum development (\$97,200 in Year One), and custodial services or supplies needed to supplement the custodian on staff (\$5,000 in Year One). Business services include legal fees (\$20,000 in Year One) and general and administrative consulting fees (\$108,500 in Year One) to cover services such as accounting, payroll processing, marketing, management consulting, and ongoing student enrollment and staff recruitment costs. Staff development and training costs (\$59,400 in Year One) represent the cost of services provided by Advantage Schools to provide instructional training to teachers and other instructional staff. Food services projections assume that the food service program will essentially net to zero because of the combination of federal free/reduced lunch revenues and lunch fees from paying students. Funds for the School's library will be raised through private sources, i.e. grants from nonprofit organizations and donations from businesses and individuals.

Revenues

In advance of receiving its first payment of regular public school funds, the Worcester Advantage Regional Charter School will seek startup funds from several sources. First, the founders and Advantage Schools will seek startup funds made available through private donations. Second, in the next several months, Advantage Schools on behalf of the School, will approach several local commercial banks to apply for and establish an operating line of credit to allow the School to pay for selected pre-opening expenses with bank funds provided in anticipation of the School's projected revenue flows.

Finally, Advantage Schools will invest collateral for securing private financing for site renovation, and will provide roughly \$250,000 in startup costs for such activities as staff and student recruitment, curriculum development, and professional development. Advantage Schools will cover any shortfalls in projected pre-opening revenues, spending up to \$350,000 during the School's startup phase.

Advantage Schools has at its disposal for the School project, the extensive backing of its equity investors, which include:

- *Fidelity Capital*, a venture capital fund of one of the country's leading financial services companies, Fidelity Investments
- *Bessemer Venture Partners*, one of New England's most successful and long-standing venture capital firms
- *Bright Horizons Children's Centers*, a leading provider of worksite day care.

B. Financial Management and Controls

A full-time, on-site business manager will be responsible for the day-to-day management of the School's business operations and finances, including accounting, budgeting, purchasing, and contract management. The business manager will report directly to the School Director. The Director and Advantage Schools will closely monitor his or her performance to ensure that the School is operating efficiently and that financial goals are being met. As part of its engagement with the Worcester Advantage Regional Charter School, Advantage Schools will provide central business and administrative services, including financial planning and reporting, accounting, procurement, and payroll and benefits management. Within 90 days of the end of each school year, a comprehensive audit of the revenues and expenditures of the charter school will be conducted in accordance with GAAP principles by a certified public accounting firm selected by the School's Board of Trustees. The results of each annual audit will then be forwarded to the Massachusetts Department of Education and other interested oversight agencies.

3. HUMAN RESOURCES

A. Faculty

In the academic year 1998-1999, with a planned enrollment of 546 students, the School's teaching staff will consist of 22 full-time regular and supplemental teachers, a special education teacher, and 11 teaching assistants. Additional staff will include one full-time and one part-time administrative assistant, a nurse, and a custodian. As required by the Individual Education Plans (IEPs) of enrolled students, itinerant specialists (including speech therapists, psychologists, and physical therapists) will be provided under contract with Advantage Schools.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

Working with Advantage Schools, the School Director will shape an exceptional teaching staff, seeking individuals with the following qualities:

- A strong undergraduate education
- High native intelligence
- A passion for helping students attain high standards
- High scores on standardized teachers' exams
- High grade point averages from high school and college
- Consistently exceptional professional evaluations
- Teaching awards and other professional honors from parent groups, local businesses, and educational partnerships
- Outstanding references from peers, former students, and parents.

Each successful applicant for a junior teaching position at the School will be assigned to a senior mentor teacher and a support team that includes other teachers, administrators, and curriculum specialists. In addition to the attributes listed above, standards for senior mentor teachers will include a distinguished record of demonstrable teaching success in an urban setting and a solid reputation for mentoring and overseeing less experienced teachers.

Most importantly, Advantage will look for faculty who share the founders'

- Belief in a rigorous academic curriculum
- Convictions that the best gift the school can bestow on its students are the skills and knowledge needed to succeed in today's economy and society, and that real self-worth comes from tangible accomplishment and from knowing things
- Entrepreneurial approach and desire to innovate in close collaboration with the entire school and national team.

The School Director will have chief responsibility for tailoring job descriptions and qualifications and hiring the School's faculty from among the most qualified applicants, based on the qualifications outlined above. Candidates for other positions in the School will also be required to demonstrate expertise and considerable experience in their fields. The School will use Equal Employment Opportunity practices in filling each position. Before final offers are made, Advantage's Human Resources Director will conduct thorough background checks on all final candidates.

B. Salary Range for Teachers and Administrators

The salaries of full-time teachers at the Worcester Advantage Regional Charter School will range from \$32,000 to \$40,000. The School Director will have a salary of \$65,000, and the Professional Development Coordinator and Business Manager will each have a salary of \$40,000. A Technology Manager will be hired part-time in Year Two, and the position will be extended to a full-time position by Year 4 with a full-time salary of \$40,000.

C. Professional Development

Two weeks of intensive professional development will be provided in July and August for all School teaching staff. Sessions will be held on the School philosophy and culture, the curriculum, student assessments and student portfolios, lesson delivery, classroom management, the School's disciplinary rules and procedures, parent outreach, and the School's technology system. Leading specialists will be engaged to conduct workshops and to address the staff; recreational activities and social periods will provide opportunities for new staff to get acquainted and to establish a tight-knit community devoted to the School's success. These activities will be organized by a full-time professional development coordinator, who will be a permanent, on-site staff member whose job is to assist faculty in effectively implementing the curriculum. An annual national conference will also unite teachers from Advantage schools across the country for professional development and networking.

The Worcester Advantage Regional Charter School structure will develop a professional environment for teachers as well as a more tight-knit, small-school climate. A "neighborhood" structure within the larger School, dividing the student body into smaller units, will provide a setting where School staff in each unit can reasonably expect to know every child and family. This structure will also provide a more collegial environment for educators. The Worcester Advantage Regional Charter School will have three full-time, regular teachers at every grade, with each grade's teachers making up a neighborhood "team." Each such team will include an experienced lead teacher who will mentor and coach the other teachers. In addition, each lead teacher will sit on a Leadership Team that will identify and attempt to resolve School-wide instructional issues in conjunction with the School Director and professional development coordinator.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

D. *Evaluation of Faculty and Administrators*

Since the School's curriculum will establish specific, measurable goals for student learning in each grade, teacher performance standards will include specific expectations for student progress during the school year as measured through periodic assessments. School-based administrators will be evaluated by the School Director, and by Advantage's Chief Education Officer Theodor Rebarber. Such evaluations will be based on the School's progress toward its established goals for student learning and financial management.

A poorly performing teacher will be provided every opportunity to improve her or his efficacy in the classroom, in conjunction with mentor teachers and the School's professional development coordinator; but if the failure is not corrected, the teacher will be dismissed. This approach will stand in welcome contrast to the traditional system, in which a teacher is never let go, but rather moved to another school and another group of children. The Worcester Advantage Regional Charter School will run an education system, not an employment system. The School will not conflate its responsibility to its customers—to uphold the right of all its students to a quality education—with a false sense of obligation to every employee, regardless of employee performance.

The ability of the School's leader to hire and fire and to shape the very best teaching staff possible for the School's children is expected to contribute to staff morale, not undermine it. Capable, hard-working teachers will no longer resent colleagues who perform poorly, cannot be dismissed, and yet are compensated equally. As in any organization, professionals respect a leader who acknowledges and rewards excellence, and who takes prompt action when performance consistently falls short of standards. This will be the guiding ethic of continued employment for any teacher at the Worcester Advantage Regional Charter School.

The School's faculty will also benefit from a faculty evaluation system that includes self-evaluation, peer and parent evaluation, and evaluation by supervisors, whether senior mentor teachers or the School Director. As in most for-profit and nonprofit corporations, evaluations will be guided by a detailed evaluation instrument. This document will guide managers in assessing each teacher's performance, as measured by progress in attaining established performance goals. In addition, each teacher will be asked to critique his or her supervisor's performance and to comment on how the supervisor could be a more effective manager.

These evaluations may also factor into a teacher's level of compensation, which will be determined by two components: first, *base compensation* will be set according to a teacher's level of experience; and second, *performance compensation*, in the form of bonuses, including equity in Advantage schools, may be awarded to teachers when merited. Although salaries will be based on merit and experience, rather than the traditional step-and-lane, they will be comparable to those of surrounding schools.

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

IV. ACTION PLAN

Advantage Schools's corporate leadership team is composed of individuals with considerable experience in facility identification, design, construction, and financing; school director and staff recruiting; curriculum development; school technology design and implementation; student recruiting and public relations; and corporate staffing. The individual expertise of Advantage's executives and their collective experience with the company's existing schools will ensure that the Worcester Advantage Regional Charter School opens on schedule and meets all the goals outlined in this application.

Working on behalf of the School, Advantage's real estate team recently completed an extensive site selection process for the Worcester Advantage Regional Charter School, and a promising location has been identified. A Letter of Introduction has been issued to the owner of the property, and it is expected that a Letter of Intent to acquire the facility will be issued by mid-January (subject to the approval of a charter). Once a final site has been identified and a lease brokered, Advantage will proceed to tap the expertise of national leaders in school design to transform an existing facility into a school befitting education in the age of technology. The founders believe that state-of-the-art equipment and educational tools are essential to ensuring students' success; moreover, they contend that urban school buildings themselves should symbolize to children and their families the best of the adult world and its achievements. Advantage charter schools in Phoenix and Rocky Mount stand in sharp contrast to the many neglected and unattractive schools in our nation's urban areas. At each location, Advantage oversaw the creation of 50,000 square feet of stunning new school space. Similarly, in Worcester, each classroom, instructional space, and common area will be specifically designed to meet the needs of teachers and students. Renovations will begin in mid-April, and construction will be complete on August 1.

In the coming weeks, Advantage's Director of Enrollment will identify possible sites for a small branch office in Worcester, which will serve as the base of operations for Advantage's student recruitment campaign. Once a charter is granted, Advantage will lease a site and hire temporary office staff to answer phones and respond to inquiries about the School. The Director will oversee this process. The office will be equipped with a phone and a fax machine, as well as a computer through which it will have remote access to the Internet and Advantage's intranet, and it will be fully stocked with information packets and other student recruitment materials. Student recruitment will begin as soon as a charter is granted, with the first parent forum being held in March. The deadline for admission applications will be June 5, and the student lottery will be held June 12. A three-day registration period will begin on June 17, during which time students will be tested for group placement. Members of the School's Board of Trustees will continue to play a central role in promoting the School within the community, generating interest among parents and students and keeping them informed about any developments.

Advantage's Chief Education Officer Ted Rebarber will oversee the recruitment of a School Director, faculty, and staff. The School will advertise in local and statewide newspapers and other media to attract a top-quality teaching staff. In addition, the founders believe that due to the scope of the proposed project, word-of-mouth will generate a substantial number of interested teacher applicants.

The founders expect a high level of interest in the School on the part of teacher candidates, as has been the case in charter schools across the country. As documented in *Teachers at Work*, Susan Moore Johnson's study of teachers and their preferences, many teachers will be drawn to an opportunity to strive for excellence in urban education provided that the organizational culture in which they will work permits them to be successful.

For example, at the Boston Renaissance Charter School, which hired Advantage Schools to provide executive management services during its start-up period, 1,500 teachers applied for the first 40 positions. Likewise, in the three other states where Advantage Schools has conducted staff recruitment for its schools—North Carolina, Arizona, and New Jersey—teachers flocked to the opportunities presented them, and Advantage received many more applications than available positions. Similarly, at the Worcester Advantage Regional Charter School, teacher recruitment will be facilitated by the School's design and by the tools for success provided to its teachers. Great teachers will want to work in an environment where they are treated as professionals; where they are provided such opportunities as ongoing professional development and such tools as laptop personal computers and telephone/voice mail/facsimile machines; where they are afforded their own private workspaces among other teachers; and where they will be charged with implementing a proven curriculum and doing the work for which they were trained: helping children learn.

While recruiting, Advantage Schools will clearly articulate the School's teacher-compensation system, which will include opportunities for significant performance-based remuneration and a benefits package equal to or better than that of the surrounding public schools. Staff will be offered an excellent benefits package, including a health plan, dental and vision coverage, life

THE WORCESTER ADVANTAGE REGIONAL CHARTER SCHOOL

insurance, and retirement benefits. In marketing the Worcester Advantage Regional Charter School, the founders will also highlight the School's rich technological resources and extraordinary facilities.

The following table summarizes the major charter implementation activities and the corresponding time frames for each milestone.

Milestone	Date(s)
1. Commencement of School Design and Operations Planning	Already Begun
2. Lease Negotiations	Ongoing
3. Conceptual Design Planning for Facility	January 1998
4. Final Approval of Charter	February 1998
5. Recruitment of Students	February-April 30, 1998
6. Recruitment of School Director	February 1998-March 15, 1998
7. Lease Finalized	March 1, 1998
8. First Parent Forum	March 1998
9. Completion of School Design and Operations Planning	March 1998
10. Contractors Selected and Use/Occupancy Permit Applications Filed	March 1998
11. Recruitment of Faculty	March-April 30, 1998
12. Commencement of Parent Information and Outreach Program	March 13, 1998
13. Appointment of School Director	March 15, 1998
14. Second Parent Forum	April 1998
15. Obtain Use/Occupancy Permits	April 1, 1998
16. Construction Begins	April 15, 1998
17. Deadline for Applications for Admission	June 5, 1998
18. Appointment of Faculty Members	May 1-June 1, 1998
19. Recruitment of Administrative Staff Members	June 1-30, 1998
20. Student Lottery	June 12, 1998
21. Student Registration, Placement Testing	June 17-19, 1998
22. Appointment of Administrative Staff Members	July 1, 1998
23. Construction Complete	August 1, 1998
24. Pre-Service Faculty and Staff Training Program	August 17-28, 1998
25. Orientation Night for Students and Parents	September 1, 1999
26. Opening of School	September 8, 1999

APPENDIX A: COURSE SCHEDULE FOR GRADES K-5

Grade	Reading	Language	Spelling	Math	Review and Practice	Handwriting/ Sentence Copying
K	30 minutes	30 minutes	_____	30 minutes	_____	10 minutes
1	Level I, II: 35 min. Level III: 90 min.	60 minutes	20 minutes	60 minutes	30 minutes	10 minutes
2	Level II: 35 min. Level III-IV: 90 min.	60 minutes	20 minutes	60 minutes	30 minutes	10 minutes
3	Level III-VI: 90 min.	60 minutes	20 minutes	60 minutes	30 minutes	_____
4	Level III-VI: 90 min.	60 minutes	20 minutes	60 minutes	30 minutes	_____
5	Level III-VI: 90 min.	60 minutes	20 minutes	60 minutes	30 minutes	_____

Grade	Social Studies	Science	Foreign Language	Music	Physical Education
K	30 minutes	30 minutes	_____	30 minutes	_____
1	45 minutes	45 minutes	_____	30 minutes (twice per week)	30 minutes (twice per week)
2	45 minutes	45 minutes	30 minutes (3 times per week)	30 minutes (twice per week)	30 minutes (twice per week)
3	45 minutes	45 minutes	30 minutes (3 times per week)	30 minutes (twice per week)	30 minutes (twice per week)
4	45 minutes	45 minutes	30 minutes (3 times per week)	30 minutes (twice per week)	30 minutes (three per week)
5	45 minutes	45 minutes	30 minutes	30 minutes	30 minutes

APPENDIX B: ACADEMIC GOALS AND SAMPLE LEARNING OBJECTIVES

GOALS	SAMPLE LEARNING OBJECTIVES
Reading in English with comprehension	<ul style="list-style-type: none"> • Read novels, short stories (including myth and folklore), poems, factual articles, biographies, and plays, including literature by Twain, Homer, London, O. Henry, Wordsworth, and Whitman. • Interpret complex forms, figurative language, and irony.
Clear, elegant, and effective communication in the English language, written and spoken	<ul style="list-style-type: none"> • Author poems and short stories. • Edit passages containing passive-voice sentences. • Spell over 5,000 words; know phonemic and morphemic strategies for spelling new words. • Take notes and reconstruct a dictated passage.
The ability to use basic and more advanced mathematics to conceptualize and to solve problems in an academic environment, in the workplace, and in other everyday settings	<ul style="list-style-type: none"> • Rewrite and solve four-value equations that have the unknown on the right. • Find area of a figure with more than one hole. • Develop strategy for determining sum of odd or even numbers in a series.
An understanding of the natural world and its workings	<ul style="list-style-type: none"> • Find the amount of work required to move a weight to specified points along an incline. • Investigate materials, light, heat, electricity, magnetism, characteristics of organisms, life cycles, solar system, causes of weather.
Knowledge of the lives and accomplishments of important individuals from American, other Western, and non-Western civilizations	<ul style="list-style-type: none"> • Read biographies of such famous Americans as Benjamin Franklin, Frederick Douglass, Abraham Lincoln, and Thomas Jefferson. • Compare differing accounts of historical figures and their accomplishments.
An understanding of the United States, other Western, and non-Western civilizations, and how they have changed over time	<ul style="list-style-type: none"> • Describe how innovations in agriculture and communication have changed society. • Locate places using latitude and longitude. • Discuss historical impacts of such economic factors as trade tariffs and bank crises.
Logical thinking, analysis, and systematic investigation	<ul style="list-style-type: none"> • Identify contradiction and rebut faulty logic. • Identify explanations for evidence, design tests, write about what the different outcomes might mean (team project). • Revise misleading arguments and present fairly.
Basic proficiency in a language other than English, as well as a general understanding of the history and culture of other nations that use the language	<ul style="list-style-type: none"> • Read stories and poems in the second language. • Ask and answer questions posed spontaneously in the second language. • Write simple sentences and paragraphs as well as they can speak them.
Informed aesthetic appreciation and judgment	<ul style="list-style-type: none"> • Discuss how color, contrast, and form are chosen for specific artistic purposes.

APPENDIX C: RESUMES OF THE BOARD OF TRUSTEES

PETER M. LUKES

193 Park Avenue, Worcester, MA 01609 ♦ (508) 752-5822

PROFESSIONAL EXPERIENCE

LUKES & LUKES, *Partner* 1996-Present

General Practice law offices specializing in divorce, probate, and civil litigation. Bulk of personal cases concern probate, criminal, and tax matters.

ATTORNEY GENERAL OF THE COMMONWEALTH OF MASSACHUSETTS, *Law Clerk* January-May, 1996

Worked in Public Charities Division. Assisting in the prosecution of a major embezzlement and tax fraud case, as well as cases involving public employment and trust law.

SUFFOLK COUNTY DISTRICT ATTORNEY'S OFFICE, *Legal Intern* January-March, 1996

Worked in the Gang Unit. Prepared materials for trial and legal memoranda. Investigated cases involving organized crime.

MERRILL LYNCH, *Sales Assistant* August-October 1996

Assisted brokers on equity trading desk of the Corporate and Institutional Sales Office. Assisted in processing and billing of listed and over-the-counter stocks.

COURT OF APPEALS OF THE COMMONWEALTH OF MASSACHUSETTS, *Judicial Clerk* Summers, 1994-95

Worked for the Honorable Judge Melvin Greenberg. Drafted judicial opinions (published and non-published), performed extensive research of case law and legislative histories, and prepared legal memoranda for the Court.

APPELLATE TAX BOARD, *Law Clerk* Spring, 1995

Worked for Commissioner Frank Scharaffa. Researched, drafted, and prepared legal memoranda concerning appeals before the Board. Majority of cases involved corporate and real estate tax controversies.

EDUCATION

NEW ENGLAND SCHOOL OF LAW, *Juris Doctor* 1996

- Admitted to the Massachusetts bar (December 1996).
- Winner, New England Scholar Award for outstanding moot court performance, 1995 and 1996.
- Winner, New England School of Law Tax Moot Court Competition, 1995.
- Captain, New England School of Law Team, National Moot Court Competition, 1996.
- Finalist, New England School of Law Honors Moot Court Competition, 1995.
- Member, New England School of Law Team, National Honors Moot Court Competition, 1995.
- Member, Moot Court Board, 1994-1995.

HAMPSHIRE COLLEGE, *Bachelor of Arts* 1993

Major: Political Science/Government

MARK L. CHEFFERS
25 Franconia Street, Worcester, MA 01602 ♦ (508) 797-0108

PROFESSIONAL EXPERIENCE

<u>MLC ASSOCIATES, <i>Founder</i></u>	<u>1987-Present</u>
Provide clients with business auditing, consulting, and financial services; litigation support; fraud detection and controllership activities; and seminar development.	
<u>PRICE WATERHOUSE, <i>Senior Accountant</i></u>	<u>1984-1987</u>
Served as senior executive for this major accounting firm.	
<u>KMG PEAT MARWICK, <i>Senior Accountant</i></u>	<u>1982-1984</u>
Began as staff accountant and was promoted to manager.	
<u>ANNA MARIA COLLEGE, <i>Instructor</i></u>	<u>1992-1993</u>
Taught courses in MBA program.	

EDUCATION

<u>HARVARD UNIVERSITY, <i>Master in Business Administration</i></u>	<u>1990</u>
<u>BOSTON UNIVERSITY, <i>Bachelor of Science and Bachelor of Arts</i></u>	<u>1982</u>
Graduated <i>magna cum laude</i> with a concentration in Accounting and Finance and a minor in Economics.	

MISCELLANEOUS

Mr. Cheffers has been a featured speaker at various business courses and conferences, and he has authored several articles on such topics as business ethics, bank failures, and manufacturing strategy. Mr. Cheffers is a Certified Public Accountant.

MARY ELIZABETH BURKE
41 Hemlock Drive, Holden, MA 01520 ♦ (508) 829-2721

PROFESSIONAL EXPERIENCE

ASSUMPTION COLLEGE, <i>Lecturer</i>	1994-Present
Teach courses including Introduction to Politics, American Government, American Political Thought, and Public Policy.	
ANNA MARIA COLLEGE, <i>Lecturer</i>	1991-1994
Taught courses including The American Presidency, American Government, American Political Thought, and Constitutional Law.	
HARVARD EXTENSION SCHOOL, <i>Teaching Assistant</i>	1990, 1993
WORCESTER MUNICIPAL RESEARCH BUREAU, <i>Research Assistant</i>	1990
BOSTON COLLEGE, <i>Teaching Assistant</i>	1986-1987
SUFFOLK UNIVERSITY, <i>Lecturer</i>	1987
BOSTON COLLEGE, <i>Research Assistant</i>	1985-1986
BRANDEIS UNIVERSITY, <i>Assistant to Brookings Fellow R. Shep Melnick</i>	1985
BRANDEIS UNIVERSITY, <i>Teaching Assistant</i>	1985

EDUCATION

COLLEGE OF THE HOLY CROSS, <i>A.B., Political Science</i>	1984
BRANDEIS UNIVERSITY	1984-1985
Graduate Studies in Political Science	
BOSTON COLLEGE, <i>Master of Arts, Political Science</i>	1994
Graduated with honors.	

Mrs. Burke is presently on leave from a Ph.D. program in political science.

HONORS

BRANDEIS UNIVERSITY, <i>Gordon Fellow</i>	1984-1985
BOSTON COLLEGE, <i>Graduate Fellowship</i>	1985-1988
BOSTON COLLEGE, <i>Teaching Excellence Award</i>	1986

CIVIC ACTIVITIES

THE FORUM WITH ARA ERESIAN, CHANNEL 13, <i>Panelist</i>	Present
ST. MARY'S PARISH, JEFFERSON, PARISH COUNCIL, <i>Member</i>	1996-Present
INST. FOR THE STUDY OF THE MAGISTERIAL TEACHING OF THE CHURCH ADV. BD., <i>Member</i>	1996-Present
WORCESTER DIOCESAN EDUCATIONAL COLLABORATIVE, <i>Lecturer</i>	1996-Present
STATE CONVENTION OF MASSACHUSETTS CITIZENS FOR LIFE, <i>Speaker</i>	1996

JENNIFER A. KNOWLES
27 Boylston Street, Worcester, MA ♦ (508) 852-2138

PROFESSIONAL EXPERIENCE

<u>YOU, INC., <i>Residential Staff</i></u>	<u>1987-Present</u>
Serve as case manager, mentor, and educator as part of the residential staff at this program for homeless teen mothers.	

EDUCATION

<u>NEW ENGLAND CONSERVATORY, <i>Piano Tech. Certificate</i></u>	<u>1985</u>
<u>UNIVERSITY OF MASSACHUSETTS, LOWELL, <i>Bachelor of Music, Music Education (K-12)</i></u>	<u>1984</u>
<u>UNIVERSITY OF MASSACHUSETTS, LOWELL, <i>Bachelor of Music, Music Theory & Composition</i></u>	<u>1982</u>
<u>WESTONBIRT SCHOOL, TETBURY, GLOS., ENGLAND</u>	<u>1977-1978</u>
<u>WALNUT HILL SCHOOL OF THE PERFORMING ARTS, NATICK, MA</u>	<u>1973-1977</u>

MICHAEL PAKALUK
Clark University, Worcester, MA 01610 ♦ (508) 793-7414

PROFESSIONAL EXPERIENCE

CLARK UNIVERSITY, <i>Associate Professor of Philosophy</i>	1994-Present
Areas of specialization: Aristotle, early analytic philosophy, Hume. Areas of competence: ancient philosophy, logic, philosophy of logic, history and moral philosophy, history of modern philosophy, medieval philosophy, Scottish philosophy, philosophy of religion, Quine, Rawls. Languages (reading knowledge): Greek, Latin, French, German, Spanish.	
BROWN UNIVERSITY, <i>Visiting Scholar in Classics</i>	1997
BROWN UNIVERSITY, <i>Visiting Scholar in Philosophy</i>	1994, 1996
CLARK UNIVERSITY, <i>Assistant Professor of Philosophy</i>	1988-1994
HARVARD UNIVERSITY, <i>Tutor and Teaching Assistant in Philosophy</i>	1984-1988

EDITORIAL CONSULTING

OXFORD UNIVERSITY PRESS
CATHOLIC UNIVERSITY OF AMERICA PRESS
PENNSYLVANIA STATE UNIVERSITY PRESS
SYNTHESE
JOURNAL OF THE HISTORY OF IDEAS
IDEALISTIC STUDIES

UNIVERSITY, PROFESSIONAL, AND COMMUNITY SERVICE

CLARK UNIVERSITY, <i>Faculty Advisor</i>	
CLARK UNIVERSITY, <i>Member of the University Judicial Board</i>	
CLARK UNIVERSITY, <i>Member of the College Board</i>	
CLARK UNIVERSITY, <i>Philosophy Club Advisor</i>	
CLARK UNIVERSITY, <i>Member of the Philosophy Department Library Committee</i>	
CLARK UNIVERSITY, <i>Computer Advisory Committee</i>	
BOSTON AREA COLLOQUUTUM IN ANCIENT PHILOSOPHY, <i>Director & Program Committee Member</i>	
AMERICAN PUBLIC PHILOSOPHY INSTITUTE, <i>Founding Member</i>	
CITY OF WORCESTER FREE PUBLIC LIBRARY, <i>Member of the Board of Directors</i>	1986-Present

EDUCATION

HARVARD UNIVERSITY GRADUATE SCHOOL OF ARTS AND SCIENCES, <i>Ph.D. in Philosophy</i>	1988
UNIVERSITY OF EDINBURGH, <i>M.Litt. in Philosophy</i>	1982
HARVARD COLLEGE, <i>A.B. in Philosophy</i>	1980

AWARDS AND HONORS

MSGR. BROWN LECTURESHIP, WESTMINSTER ABBEY, B.C., CANADA	1996
ASPEN INSTITUTE FELLOW	1996

BRITISH-AMERICAN PROJECT DELEGATE	1994
DISTINGUISHED SCHOLAR LECTURESHIP, BROWARD COMMUNITY COLLEGE	1991
JAMES A. WESTERGARDEN TRAVELING FELLOWSHIP	1986
JAMES J. BAKER FELLOWSHIP	1982-1984
MARSHALL SCHOLARSHIP	1980-1982
PHI BETA KAPPA	1978
DETUR BOOK PRIZE	1976

SELECTED PUBLICATIONS

"Commentary on David O'Connor," forthcoming in *Proceedings of the Boston Area Colloquium in Ancient Philosophy*, vol. XIII, University Press of America.

Nicomachean Ethics VIII and IX, translation with commentary, Clarendon Aristotle Series (in press).

"The Egalitarianism of the *Eumidean Ethics*," forthcoming, *Classical Quarterly*.

"Commentary on Donald Morrison," *Proceedings of the Boston Area Colloquium in Ancient Philosophy*, vol. IX, University Press of America, 1995, 157-166.

"Friendship and the Comparison of Goods," *Phronesis* 37, 1992, 111-130.

GRANTS

CENTRE FOR PHILOSOPHY AND PUBLIC AFFAIRS FELLOWSHIP, UNIVERSITY OF ST. ANDREWS	1997
EARHART FOUNDATION FELLOWSHIP	1996-1997
CLARK UNIVERSITY FACULTY DEVELOPMENT AWARD	1988-1989, 1990-1991, 1991-1992, 1995-1996
HIGGINS SCHOOL OF THE HUMANITIES AWARD	1991-1992, 1994, 1995

ROSEMARY ROSARIO

52 Eastern Avenue, Worcester, MA 01605 ♦ (508) 831-7164

PROFESSIONAL EXPERIENCE

WORCESTER COUNTY HOUSING COURT, *Housing Court Specialist, Mediator* 1985-Present

- Interpret applicable state laws and regulations to become familiar with particular issues involved in litigation.
- Create a relaxed atmosphere during mediation, actively listen to and encourage equal participation of the parties, and creatively arrive at equitable solutions that satisfy opposing parties.
- Prepare written resolutions of civil, summary process and small claims settlements, which are both intelligible for court proceedings and comprehensible to parties who may be less literate.
- Interact with a diverse public to investigate emergency situations and find speedy and just remedies.
- Conduct on-site investigations of residential properties to determine if there are violations of the state sanitary code affecting the health, safety, or well-being of the occupants.
- Interpret complex building codes, prepare inspection reports, and monitor cases until completion.
- Prepare summonses, notices, court orders, and schedule hears on the court computer system.
- Conduct financial reviews to determine the ability of a defendant to pay a court judgment.
- Serve as interpreter for Spanish speakers requiring accurate translation of court testimony.

HOUSING INFORMATION CENTER, *Housing Counselor* 1984-1985

- Interpreted Department of Social Services (DSS) contract, developed billing procedures, and trained staff.
- Conducted intake procedures and performed case recordings according to DSS guidelines.
- Counseled a culturally diverse population at differing economic levels and social status.
- Alerted appropriate municipal departments of building containing hazardous conditions.
- Accessed services necessary to stabilize home environments of clients.
- Educated clients regarding legal responsibilities and housing code regulations, and directed workshops on safe housing and arson prevention.
- Provided information on housing discrimination to the community through local Spanish television station.

PERNET FAMILY HEALTH SERVICES, *Coordinator/Assessment Specialist* 1983-1984

- Advised the agency's Executive Director concerning the needs of Worcester's Hispanic population, and developed and managed health program for Latinos.
- Conducted outreach to area agencies and publicized program throughout community.
- Interviewed families, recorded case histories, and assessed social and behavioral areas needing modification in family dynamics.
- Developed Care Plans for health workers to follow, which delineated problems and methods of intervention and correction.
- Supervised health workers, trained staff to handle many types of social and behavioral encounters, and conducted case review until goals were reached.
- Worked with agency social worker, specialists, psychologists, and those serving clients.
- Organized groups and taught classes in child development, nutrition, and cultural awareness, and translated educational materials into Spanish.

EDUCATION

RADCLIFFE COLLEGE/HARVARD UNIVERSITY, *B.A., Romance Languages* 1980

Ms. Rosario has also taken graduate courses in health and psychology at Worcester State College.

COMMUNITY SERVICE AND CONTINUING EDUCATION

NONVIOLENCE WORKSHOP: RESOLVING INNER-CITY CONFLICTS, *M.L.K. Center, Atlanta, GA*

MAHATMA GHANDI NONVIOLENCE SEMINAR, *Wellesley College*

ADVANCED MEDIATION WORKSHOP, *Fitchburg State College*

"GENDER, PERCEPTION, AND CONFLICT IN COMMUNICATION" SEMINAR, *Suffolk University Law School*

MASSACHUSETTS COMMISSION AGAINST DISCRIMINATION TRAINING

NEW ENGLAND CAMPFIRE COUNCIL, *Member of the Board*

APPENDIX D: RESUMES OF THE PRINCIPALS OF ADVANTAGE SCHOOLS, INC.

STEVEN F. WILSON
23 Alveston Street, Jamaica Plain, MA 02130 ♦ (617) 983-3675

EXPERIENCE

ADVANTAGE SCHOOLS, INC., *Founder, President, and CEO* February 1996-Present
Founded and manage this for-profit education management company, which operates two charter schools, serving over 1,100 students, and is scheduled to open six more next year.

COMMONWEALTH OF MASSACHUSETTS, *Director of Strategic Planning* 1993-1996
Responsible for "reinventing government" initiatives in Governor William Weld's administration, including long-term policy initiatives of government reorganization, education reform, charter schools, privatization, purchased social services, and permit streamlining. In conjunction with lead agencies, developed policies for information technology, inner city economic development policy, and minority business development.

- Led team that developed and wrote Governor Weld's plan to reorganize Massachusetts state government, *The Government We Choose: Lean, Focused, Affordable*. The plan, announced in November 1995, would eliminate five secretariats and 76 agencies and reduce the state workforce by 7,500, while improving the quality of state services. The plan's fifty initiatives would result in annual savings of two-thirds of a billion dollars and permit a one-half billion dollar cut in the state's income tax.
- Recommended to governor measures that successfully brought landmark education reform act stalled in conference committee to his desk for enactment, including a House/Senate compromise on key measures of school choice and charter schools. Evaluated final bill and recommended enactment; developed follow-on legislation. The Administration's largest investment, the Act has directed over \$1.2 billion to date to the public schools, principally in the state's poorest cities and towns, and ensured a floor of resources for every school district.
- Secured passage of charter school legislation. Established ad hoc task forces on key issues facing charter schools as they prepared for September 1995 opening, including locating sites, determining funding levels, addressing legal obstacles, and overcoming opposition from local school districts.
- Guided state's effort to open Edison Project charter school in Massachusetts, the largest charter school in the country. Working closely with local founders and Edison management, overcame hurdles facing the start-up of these innovative schools, including securing sites. Arranged for lease of surplus state building for 600 student school in Boston, identified \$12 million in build-out financing from quasi-public agency for improvements completed in September 1996.
- Drafted and filed legislation to reform fundamentally state's special education and bilingual laws. Developed support for the proposals from city and town officials, administrators, educators, and the media; bills are now before Legislature.
- Fought to preserve the demanding new academic curriculum, standards, and tests required by the Education Reform Act and prevent its perversion into "Outcome Based Education" by education officials. Successfully prevented the first such effort, the establishment of a "Common Core of Learning" supplanting statewide academic standards required by the Act.
- Coordinated state's privatization initiatives, developed "checklist" oversight tool now adopted by other states and municipalities, and established policies to promote employee redeployment and minimize minority impact. Led fight against anti-privatization legislation, including statewide media tour, garnering editorial support from the state's major dailies. Debated bill's sponsors on radio and television and assisted the bill's legislative opponents.
- Led development of policy initiatives across state government to close projected \$400 million gap in state's 1996 \$16 billion budget.
- Co-chaired comprehensive review of state's \$1 billion purchase of service system, resulting in broad reforms to the way state purchases social services and addressing the charges of waste and abuse.

Established measures to ensure accountability of present system while leading the state in the move away from purchasing inputs and toward buying results from human service providers.

- Undertook review of the Administration and Finance secretariat by private management consulting firm resulting in proposals for \$100 million in annual savings. Coordinated implementation.
- Represented governor at state legislative hearings, on TV and radio, and at Alliance for Redesigning Government, National Governor's Association Task Force on Redesigning Government, Americans for School Choice, National Council for Public/Private Partnerships, Council of Governor's Policy Advisors, National Policy Forum, and other organizations.

PIONEER INSTITUTE FOR PUBLIC POLICY RESEARCH, *Executive Co-Director*

1991-1993

Co-managed the state's leading think tank, a non-profit, non-partisan research institute focusing on state policy, including education reform, government restructuring, and privatization.

- Researched, wrote, and published *Reinventing the Schools: A Radical Plan for Boston*, a comprehensive review of the Boston Public Schools. Worked with business leaders, the mayor, school committee, and community leaders to implement the book's principal recommendation, the establishment of autonomous "entrepreneurial" schools in the district. Assisted the school committee in obtaining enabling provisions in collective bargaining. School committee has launched the new "pilot schools," selecting competitive proposals for the new schools submitted by school staff. The new schools enroll students under a district-wide school choice plan and are funded on a capitated basis with few restrictions on management's autonomy.
- Invited by Governor Weld to draft policy recommendations for statewide K-12 education reform. Wrote three-point education plan (school finance reform, universal school choice, charter schools), and worked to ensure passage. Coordinated efforts with governor's policy advisor, Board of Education, Senate committees, and Senate president.
- Drafted legislation establishing charter schools and organized successful political action to ensure its passage. The resulting charter school law is now widely considered the strongest such law of the states. Helped local business leader establish *CEOs for Fundamental Change in Education*, a coalition of 300 area executives, to build political support for charter schools and school choice.
- Advocated entrepreneurial and market-oriented education reforms through numerous press releases, op eds, radio and television appearances, speaking engagements, conferences, and briefings to city and state officials.
- Hired a development director and more than doubled Institution revenues.

DAS, INC., *Founder, President, and Chairman*

1984-1989

Developed a new hardware and software system for automating process plants in the specialty chemical, pharmaceutical, biotechnology, and food industries. While other computerized systems for plant automation used minicomputers and were custom programmed for each job, DAS's product tapped personal computers networked to microprocessor-based controllers. Plant staff could program their own applications by diagramming them on screen with familiar symbols. Raised venture capital, oversaw staff of 40, and led sales effort. Successfully targeted the pharmaceutical market, leading to Johnson and Johnson's adoption of the product for worldwide application. Technology is now industry standard.

KEITHLEY/DAS (JOINT VENTURE) *CEO, Managing Partner*

1983-1984

Negotiated joint venture agreement with Keithley, a leading instrument company in Cleveland, Ohio, to manufacture and market the Data Acquisition Systems product. As CEO of the joint venture, expanded the product line, transferred manufacturing to Ohio, trained domestic and international sales force, and grew sales to \$4 million annually in nine months. Agreement infused \$4 million into joint venture and netted \$1.6 million in cash for DAS. Product was adopted as a standard by Kodak and General Motors and is now installed in 10,000 applications worldwide. Sold joint venture to Keithley; now the company's largest division.

DATA ACQUISITION SYSTEMS, INC., *President and Chairman* 1980-1984
Founded this high technology company while a college senior to design, manufacture, and market the first personal computer-based measurement and control system for the automation of laboratory and industrial processes. Designed hardware, recruited and managed software engineering team. Raised \$600,000 in seed venture capital. Sold to Keithley Instruments.

EDUCATION

HARVARD UNIVERSITY, *A.B. 1990, Sociology* 1977-1980, 1989-1990

PUBLICATIONS

Reinventing the Schools: A Radical Plan for Boston (Pioneer Institute book, 1992), *The Government We Choose: Lean, Focused, Affordable* (1995 report), *Privatization: Getting Results in Massachusetts* (1994 report), *Strengthening the Commonwealth's Purchase of Service System* (1994 report), *An Action Agenda to Redesign State Government* (National Governor's Association report, 1993), *Reducing the Size and Scope of State Government*, (National Policy Forum chapter, 1993), *Agenda for Leadership* (Pioneer Institute chapter, 1993), numerous other articles, book chapters, editorials, and reports.

THEODOR REBARBER

38 West Cedar, Apartment 2, Boston, MA 02108 ♦ (617) 723-0331

EXPERIENCE

ADVANTAGE SCHOOLS, INC., *Chief Education Officer and Founding Partner* Feb. 1996-Present

Joined company President Steven Wilson in founding education management company and in developing and implementing its business strategy. Secured distinguished academic advisory board.

- Design school educational and curricular program.
- Conduct detailed analysis of charter policies in different states.
- Recruit local business and community leaders as strategic partners.

US REP. STEVE GUNDERSON, *Legislative and Communications Director* Jan. 1995-Mar. 1996

Served as Legislative and Communications Director for Rep. Steve Gunderson, a senior member of the House Economic and Educational Opportunities Committee in the U.S. Congress and member of the Speaker's Task Force on Reform in the District of Columbia.

- On behalf of Rep. Gunderson and the Speaker's Task Force on the District of Columbia, oversaw communications for, and drafting of, the District of Columbia School Reform Act of 1995.
- Negotiated on behalf of the House with the Senate and Administration on amendments to the Act, securing Congressional passage and signature by the President of the Act's far-reaching charter school provisions.
- Developed and passed major legislative and policy proposals for Rep. Gunderson, including comprehensive education reform for the District of Columbia, merger and restructuring of the US Departments of Education and Labor and the Equal Employment Opportunities Commission (EEOC), and privatization of National Endowment of the Arts (NEA) through the establishment of a "true" endowment.
- Developed community and constituency support through outreach activities to diverse audiences—from CEOs to inner-city churches—including meetings, panels and speeches.
- Dealt with press on background and on record to explain complex, sometimes controversial proposals and develop positive media coverage.
- Drafted op-ed articles on behalf of Rep. Gunderson.
- Coordinated relevant activities of Legislative Assistants, the Press Secretary, Committee staff, and House Legislative Counsel.

THE EDISON PROJECT, *Associate Director for Curriculum and Assessment* Oct. 1993-Dec. 1994

Worked on team that developed detailed Edison curriculum design and communicated that design to potential customers.

- Researched and drafted Edison curriculum standards, including several subject areas of *Student Standards for the Readiness Academy*, *Student Standards for the Primary Academy*, *Student Standards for the Elementary Academy*, and *Student Standards for the Junior Academy*.
- Managed the design and development of Edison's student assessment system, working with in-house subject specialists, researchers, and consultant test developers.

- Developed Edison's instructional framework for "Character and Ethics," discipline policy, and other aspects of school culture.
- Participated on professional development task force developing Edison's training program for teachers and other professional school staff.
- Represented Edison before local education officials, the press, and other interested parties.

U.S. DEPT. OF EDUCATION, *Special Asst. to Asst. Sec. for Research* Mar. 1991-Sept. 1993

Served in the Office of Educational Research and Improvement (OERI) within the office of the Deputy Assistant Secretary for Policy and Planning.

- Assisted in policy coordination and oversight on projects to develop national academic standards and assessments.
- Oversaw implementation of special projects of high priority to the Assistant Secretary, including a line of practitioner-oriented research publications based on the National Education Goals; a set of research-based publications for parents with low literacy level; and America 2000 Arts Partnership, an inter-agency arts initiative.
- Gave speeches or represented the Assistant Secretary at various conferences and events, such as the annual meeting of state directors of special education, the Secretary's Committee on Chapter 1 Testing, and the National Governors' Association (NGA) Task Force on School Delivery Standards.
- Reviewed official research and policy reports on behalf of the Assistant Secretary prior to approval for publication by the Department.
- Drafted speeches, articles, Congressional testimony, policy publications, and other documents for the Assistant Secretary, the Deputy Assistant Secretary, and Secretary Lamar Alexander.
- Served on the staff of the National Council on Education Standards and Testing, co-chaired by Governors Roy Romer and Carroll Campbell, and including representatives of the federal government, business and labor. Drafted chapters of the Council's final report and researched effective educational practices in other nations.

EDUCATIONAL EXCELLENCE NETWORK, VANDERBILT UNIVERSITY

Research Associate May 1989-Feb. 1991

Monitored effective educational practices for EEN's membership of leading educational reformers at federal, state, and local levels.

- Managed multi-year education reform project for EEN with the National Conference of State Legislatures (NCSL), including an institute for delegations from 15 states, development of education policy publications, and ongoing technical assistance.
- Worked on diverse education reform projects, including Education for Democracy with the American Federation of Teachers (AFT) and evaluation of Chicago school reform.
- Edited and wrote for EEN's journal, *Network News & Views*, a monthly compilation of news and commentary on education reform initiatives at the local, state, and federal levels as well as in other nations.
- Researched a broad range of education policy topics related to federal, state, district, school, and classroom levels.

WASHINGTON LEGAL FOUNDATION, *Research Assistant*

July 1988-Feb. 1989

Researched legal topics, including regulatory, environmental, and civil rights. Edited legal policy briefs.

EDUCATION

WESLEYAN UNIVERSITY

B.A., with major concentrations in Government and Philosophy

June 1988

Editor, *The Wesleyan Review*

PUBLICATIONS

State Policies for School Restructuring (National Conference of State Legislatures), *Education Reform in the '90s* (edited with Chester E. Finn, Jr., Macmillan Press), *Accountability in Education*, (National Conference of State Legislatures), *Helping Your Child Learn Responsible Behavior* (edited for Edwin J. and Alice B. Delattre, D.C. Health), *Parent Enabling Policies for States* (National Conference of State Legislatures), numerous other newspaper articles, papers, and monographs.

KATHLEEN ANN MADIGAN
1568 Fairmount Boulevard, Eugene, OR 97403 ♦ (541) 343-6054

PROFESSIONAL EXPERIENCE

ADVANTAGE SCHOOLS, INC., *Director of Curriculum and Instruction* 1997-Present
Responsible for shaping and implementing the curriculum at charter schools managed by Advantage Schools, Inc.

- Direct the school-wide implementation of Direct Instruction, the curriculum and staff development model in Advantage's charter schools.
- Manage curriculum product development teams for K-5 content areas, such as character education, science, history, music, art, physical education.

ENGELMANN-BECKER CORP., *Direct Instruction Implementation Project* 1993-Present
Responsible for school-wide implementation of Direct Instruction curriculum and staff development model at ten sites.

- Oversee contracts, pre-service training, ongoing professional development, achievement projections.
- Supervise on-site consultants and quality assurance monitors.
- Conduct liaison work with superintendents and other school administrators.

UNIVERSITY OF OREGON COLLEGE OF EDUCATION, *Assistant Dean* 1993-1997
Responsible for administration, budget and policy development for the College of Education.

- Directly supervised faculty and staff to provide academic and student services, technology and network services, and personnel evaluation.
- Served as liaison between the University of Oregon College of Education and the Oregon System of Higher Education and the University Graduate School.
- Participated in curriculum review of degree programs.

In 1996, the College of Education operated a budget of over \$16 million (\$12-15 million from grants and contracts); the College was ranked in the top third of all graduate schools of education in the United States, and fifth in special education by *U.S. News and World Report*.

LEARNING SERVICES CORPORATION, *Regional Vice President and Program Director* 1992-1993
Supervised 35 professional and paraprofessional staff for a 24-bed post-acute rehabilitation, home-centered and supported living program. Directly responsible for business operations, marketing and sales, and clinical outcomes of clients with brain injury. Awarded accreditations from the Commission for the Accreditation of Rehabilitation Facilities (CARF) and the Joint Commission for the Accreditation of Health Care Organizations (JCAHO).

SAN DIEGO STATE UNIVERSITY, *Assistant Professor* 1991-1993

- Advanced Issues in Special Education for International Students
- Law and Litigation for the Resource Specialist
- Introduction to Special Education

INSTITUTE FOR EFFECTIVE EDUCATION, *Director, Curriculum & Professional Training* 1987-1992
Analyzed and designed curriculum using Direct Instruction in functional and academic areas for diverse learners with learning and emotional disorders.

- Developed ongoing training program for 50 professional and paraprofessional staff members.
- Directly supervised program for three- to eight-year-olds.
- Trained staff to perform functional assessments, to use Skinner's concepts in Verbal Behavior, to describe communications processes, and to use sign language with non-vocal children.

MODESTO PSYCHIATRIC CENTER, *Director, Adult Inpatient Psychiatric Program* 1986-1987

- Supervised 50 staff (nurses, social workers, psychologists and teachers).
- Developed and implemented marketing and business plans.
- Designed the Depression Evaluation and Education Program for 30 beds of a free-standing 60-bed psychiatric hospital.
- Established an on-site private school for children and adolescents with emotional problems.

CALIFORNIA STATE UNIVERSITY, STANISLAUS, *Lecturer, Division of Education* 1981-1986

- Prepared and taught over 20 courses in Education and Psychology.
- Advised over 200 undergraduates in Liberal Studies program.
- Directed the placement and supervision of special education fieldwork students.
- Participated in college-wide faculty research and development committee.
- Co-authored federal grant that awarded funds for the preparation of handicapped pupil personnel.

EMPIRE ELEMENTARY SCHOOL, *E.S.E.A., Title I Resource Teacher, K-5* 1979-1981

Trained, supervised, and evaluated six instructional aides; implemented large and small group instruction; developed and implemented parent training classes; designed and supervised programs for over 200 disadvantaged students.

MARK TWAIN JUNIOR HIGH SCHOOL, *Resource Specialist* 1977-1979

Assessed over 90 students annually; delivered instruction to 28 identified students with learning disabilities. Collaborated with regular education teachers within the junior high to provide appropriate services to students from diverse and multicultural backgrounds.

STANISLAUS COUNTY SPED LOCAL PLANNING AGENCY, *Educational Diagnostician* 1977-1979

Member of county-wide assessment team which evaluated and diagnosed children and youth aged 3-21 identified as needing special education services, yet for whom precise placement options were unclear. Provided expertise in rate of learning of learning for forensics cases.

CALAVERAS UNIFIED SCHOOL DISTRICT, *Special Day Class Teacher* 1976-1977

Taught Grades 6-12. Established and implemented programs for male wards of the court from multicultural backgrounds.

BUTTES COUNTRY SCHOOL, INC., *Teacher/Principal* 1975-1976

Served as teacher/principal for this one-room country school, serving grades K-6.

PROFESSIONAL CONSULTATION EXPERIENCE

ASSOCIATION FOR DIRECT INSTRUCTION, *Consultant* 1983-Present

Conducted two- and three-day training workshops in Supervision; Staff Development; Corrective Reading; Decoding and Comprehension; Expressive Writing; DISTAR Language; and Direct Instruction Programs for individuals with learning disorders and severe disabilities.

SCIENCE RESEARCH ASSOCIATES, *Consultant* 1984-Present

Conducted over 400 full-day training workshops for administrators, supervisors, teachers, and paraprofessionals in using Direct Instruction materials; assisted district administrative personnel in establishing and implementing ongoing staff development programs; assisted supervisory personnel in using data-based supervision tools.

MONTERREY COUNTY SCHOOLS OFFICE, *Consultant* 1986-Present

Conducted over 100 training workshops for K-12 special education teachers, paraprofessionals, and program specialists in Behavior Management, Social Skills Training, and Direct Instruction; in-serviced over 200 parents in behavior management strategies, communication strategies, and using effective teaching technology at home.

NATIONAL INSTITUTES OF HEALTH AND SMALL BUSINESS IMPROVEMENT RESEARCH GRANT IN
"COGNITIVE REHABILITATION CURRICULUM FOR HEAD INJURED ADULTS," *Consultant* 1992-Present

Developed and designed a Direct Instruction curriculum to promote generalized memory responses. Evaluating the effectiveness of program implementation and revising during field testing. Currently two implementation sites in North Carolina and one in Southern California.

INTERNATIONAL INSTITUTE FOR THE ADVOCACY FOR SCHOOL CHILDREN, *Consultant* 1992-Present

Assist concerned citizens in advocating on behalf of school-aged children to prevent academic child abuse; respond to inquiries regarding the effectiveness of current trends in education.

DEVELOPMENTAL DIMENSIONS INSTITUTE, *Consultant and Educational Director* 1984-1986

Supervised therapists, performed educational evaluations, provided in-service and rehabilitation programming, delivered cognitive rehabilitation therapy for brain injured adults.

VOCATIONAL EDUCATION PROJECT, MERCED COUNTY SCHOOLS, *Consultant* 1983-1984

Designed vocational educational materials to teach reading to secondary special education students for entry in Regional Occupational Programs. Designed prevocational instruction program for persons with severe disabilities, using effective teaching technology. Produced training videotapes of instructional procedures for memory skills training. Implemented generalized compliance training program for individual with multiple handicaps. Taught sign language to staff for use with non-vocal students.

EDUCATION

UNIVERSITY OF THE PACIFIC, *Doctor of Education* August 1993

Major: Special Education. Minor: Higher Education—Administration and Social Foundations.

Dissertation: *Teaching History Facts to Learning and Behaviorally Disordered Youngsters: A Comparison of Two Instructional Procedures.*

UNIVERSITY OF THE PACIFIC, *Master of Arts* May 1980

Major: Counseling and Educational Psychology. Minor: Special Education.

CALIFORNIA STATE UNIVERSITY AT CHICO, *Bachelor of Arts* May 1974

Major: Philosophy. Minor: Psychology and English.

Teaching Credential for the Severely Handicapped (Life)

University of the Pacific, May 1980.

Teaching Credential for the Learning Handicapped (Life)

California State University at Sacramento, May 1977

Teaching Credential Multiple Subjects K-12 (Life)

California State University at Chico, May 1974.

SELECTED PUBLICATIONS

Madigan, K., Hall, T., and Glang A. (1997) Effective Assessment and Instructional Practices for Students with Acquired Brain Injury. In A. Glang, G. Singer, & B. Todis (Eds.), Students with Acquired Brain Injury (pps. 123-183). Baltimore: Paul H. Brookes Publishing Co.

Engelmann, S. and Madigan, K. (1996) Direct Instruction Peer Coaching Manual. Engelmann Becker Corporation.

Madigan, K. (1994) Supervision and Professional Development: Keys to Success. ADI publications.

Madigan, K. (1994) Direct Instruction: Instructional modules for staff development. Children's Workshop publications.

Cipani, E. and Madigan, K. (1986) "Errorless Learning: A Review of the Literature for Difficult to Teach Students." Canadian Journal of Special Education.

McCook, E., Cipani, E., Madigan K. and Lacompagne, J. (1986) "Developing Requesting Behavior: Acquisition, Fluency, and Generality." Journal of Special Education.

APPENDIX E: BUDGET TEMPLATE

Projected Revenues & Expenditures

Worcester Advantage Regional Charter School:

I. Revenues	Start-Up Phase 2/98-Opening	Fiscal Year 1999	Fiscal Year 2000	Fiscal Year 2001	Fiscal Year 2002
Tuition	\$ -	\$ -	\$ -	\$ -	\$ -
State Grants	\$ -	\$ 3,023,529	\$ 3,521,913	\$ 4,020,297	\$ 4,518,681
Private Funds	\$ -	\$ 75,000	\$ 125,000	\$ 125,000	\$ 100,000
Other (explain)	\$ 350,000	\$ -	\$ -	\$ -	\$ -
Total Revenues	\$ 350,000	\$ 3,098,529	\$ 3,646,913	\$ 4,145,297	\$ 4,618,681
II. Expenditures					
Professional Salaries					
School Director		\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
Supervisors		\$ 80,000	\$ 100,000	\$ 100,000	\$ 140,000
Teachers (FT)		\$ 1,055,000	\$ 1,205,500	\$ 1,356,000	\$ 1,494,000
Teachers (PT)		\$ 34,000	\$ 44,000	\$ 66,000	\$ 66,000
Payroll taxes					
Benefits (incl. employer taxes)		\$ 253,853	\$ 306,120	\$ 350,323	\$ 384,908
Total Professional Salaries		\$ 1,487,853	\$ 1,720,620	\$ 1,937,323	\$ 2,149,908
Administrative Staff					
Clerical		\$ 28,000	\$ 59,000	\$ 70,000	\$ 70,000
Custodial		\$ 22,000	\$ 44,000	\$ 44,000	\$ 44,000
Consultants		\$ -	\$ -	\$ -	\$ -
Other (Nurse/Librarian)		\$ 22,500	\$ 58,000	\$ 102,000	\$ 102,000
Total Administrative Staff		\$ 72,500	\$ 161,000	\$ 216,000	\$ 216,000
Facility					
Rent		\$ 627,487	\$ 627,487	\$ 670,909	\$ 670,909
Insurance		\$ 21,606	\$ 50,894	\$ 58,096	\$ 65,298
Mortgage		\$ -	\$ -	\$ -	\$ -
Renovation/Construction		\$ -	\$ -	\$ -	\$ -
Debt Service		\$ -	\$ -	\$ -	\$ -
Utilities		\$ 43,000	\$ 50,644	\$ 57,811	\$ 64,978
Total Facility		\$ 692,093	\$ 729,025	\$ 786,817	\$ 801,185

Projected Revenues & Expenditures

Worcester Advantage Regional Charter School:

Worcester Advantage Regional Charter School					
Materials/Supplies					
Textbooks	\$ 28,401	\$ 37,139	\$ 42,866	\$ 48,099	
Instructional Equipment	\$ 56,180	\$ 65,440	\$ 74,701	\$ 83,961	
Office/Classroom Technology	\$ 53,791	\$ 70,342	\$ 80,475	\$ 90,609	
Library	\$ -	\$ -	\$ -	\$ -	
Office Furniture	\$ -	\$ -	\$ -	\$ -	
Classroom Furniture	\$ 41,553	\$ 54,338	\$ 62,166	\$ 69,994	
Other Equipment	\$ 49,989	\$ 65,998	\$ 75,483	\$ 81,733	
Total Materials/Supplies	\$ 229,914	\$ 293,258	\$ 335,692	\$ 374,396	
Other Costs					
Contracted Svcs. (Incl. Spec. Ed/Curric)	\$ 173,180	\$ 211,180	\$ 247,180	\$ 309,910	
Business Services	\$ 128,500	\$ 160,625	\$ 192,750	\$ 260,213	
Marketing/Development	\$ -	\$ -	\$ -	\$ -	
Staff Development/Training	\$ 59,400	\$ 74,250	\$ 89,100	\$ 120,285	
Transportation	\$ 250,000	\$ 291,209	\$ 332,418	\$ 373,626	
Food Service	\$ 2,293	\$ 2,671	\$ 3,049	\$ 3,427	
Total Other Costs	\$ 613,373	\$ 739,935	\$ 864,497	\$ 1,067,461	
Other Start-Up Costs Only					
Curriculum Development	\$ 66,363				
Printing and Copying	\$ 154,296				
Student and Staff Recruitment	\$ 33,182				
Travel/Transportation					
Telephone/Fax/Postage	\$ 96,159				
Consultants					
Total Start-Up Costs	\$ 350,000	\$ -	\$ -	\$ -	
Total Revenues	\$ 350,000	\$ 3,646,913	\$ 4,145,297	\$ 4,618,681	
Total Expenditures	\$ 350,000	\$ 3,643,838	\$ 4,140,328	\$ 4,608,950	
Balance	\$ -	\$ 3,075	\$ 4,969	\$ 9,731	